Hort Innovation

Final Report

Consumer market research for Australian mangoes 2019-20

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Delivery partner:

Sprout Research

Project code:

MG19000

Project:

Consumer market research for Australian mangoes 2019-20 MG19000

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Summary

Sprout Research has been working with Horticulture Australia Limited (HAL) / Hort Innovation and various growers since 2009 with the objective of developing a better understanding of the purchasing habits and drivers of the Australian Mango buyer. Over this time Sprout Research has utilised several methodologies to establish and track, purchase incidence, purchase drivers, usage occasions and profiles. This report forms part of a longitudinal study. Sprout Research has incorporated information from previous studies and updated it with the results from the 2020 study.

Hort Innovation is committed to increasing grower profitability through increased consumer demand for Australian mangoes (outcome 2). To support this, Hort Innovation required a deeper understanding of consumer behaviour and attitudes concerning mangoes as well as triggers and barriers to purchasing mangoes. Using the data collected from a 10-minute online survey of n=1,200 Australian mango buyers as well as n=200 non-mango buyers, Sprout Research will provided a research report and presentation outlining insights and recommendations concerning Australian mango consumption and how consumer behaviour and attitudes has changed over time.

The key research objectives:

- establish and track purchase incidence, purchase drivers, usage occasions and consumer profiles;
- inform marketing strategy by measuring and understand shopper behaviour – planned vs. impulse purchasing, as well as perceptions of mangoes as a treat;
- measure triggers and barriers to purchase, including consumer confidence in selecting mangoes;
- understand consumers' taste preference and quality perceptions when it comes to mangoes;
- understand consumer attitudes to health and nutrition;
- explore mangoes' competitive set through understanding what else is considered or substituted when selecting mangoes;
- measure the perceived value of mangoes relative to other fruits.

Keywords

Consumer, consumption, incidence, awareness, usage, occasions, purchase triggers, attitudes, perceptions, survey, mangoes, mango

Introduction

Sprout Research has been working with Horticulture Australia Limited (HAL) / Hort Innovation and various growers since 2009 with the objective of developing a better understanding of the purchasing habits and drivers of the Australian Mango buyer.

Over this time Sprout Research has utilised a number of methodologies to establish and track, purchase incidence, purchase drivers, usage occasions and profiles.

This report forms part of a longitudinal study. Sprout Research has incorporated information from previous studies and updated it with the results from the 2020 study.

Up to and including 2014, the methodology used in the Consumer Preference Study has been both Computer Assisted Telephonic Interview (CATI) Omnibus, and customised Online Survey.

In 2017 and 2020, the methodology has been switched to a 'fully' online methodology as companies that have offered CATI omnibus surveys in the past have discontinued them for the following reasons: -

- The incidence of fix line telephones (which CATI makes use of) is declining in Australia, and the number of mobile-only phone users is on the increase.
- Mobile phone users also differ from fixed-line only phone users – they tend to be younger, singles/couples and renting.

Whilst a standalone ad hoc CATI survey would be possible – the cost would be significantly more than the syndicated, shared cost approach used in an omnibus.

Outputs

Full report of the findings; Consumer Preference Study 2020 - which includes:

- Purchase incidence and frequency
- Profile of mango consumers
- understanding of who in the household is consuming mangoes-Consumption occasions
- understanding of how mangoes are being consumed within the household-Triggers and barriers to purchase including confidence, taste, value, health etc.
- Attitudes to health and nutrition
- Profile of purchase occasions - where are they purchasing and why?
- Varietal awareness

These results were compared where possible to previous data.

Outcomes

The outcome of this research inform Hort Innovation and the mango industry's understanding of the consumer, supporting more informed marketing and R&D activity through increased knowledge of consumer attitudes and behaviour.

Monitoring and evaluation

A milestone schedule was used to monitor the project's progress. The report was delivered according to the objectives above within the allocated timeframe and budget.

Recommendations

A list of key insights and recommendations:

Mango Incidence & Purchase Frequency

- Mango purchasing frequency has increased from 2017.
- There have also been slight increases in single purchasing frequencies, driven mainly by younger buyers.
- Purchase incidence has remained unchanged from 2017, which could indicate the market penetration limit has been reached.

Awareness of Mangoes

- Overall varietal awareness has increased, with more consumers able to identify varieties unprompted. This appears to be driven by increases in Kensington Pride and Calypso recall.
- Prompted varietal awareness is nearly three-fold unprompted and follows the same trends, generally increasing year-on-year for most varieties.
- Unprompted and prompted awareness of Bowen mangoes has remained stagnant after it saw major drops in 2017. This is likely due to a shift in naming to Kensington Pride.

Buyer Profile

- Expense as barriers to purchase amongst non-buyers have decreased slightly from 2017. There has been a slight increase in the amount of mango buyers in lower income brackets.
- Consumption amongst children has seen a slight drop from 2017; younger children continue to eat more than older children.
- Consumption amongst adult males has seen a steady decrease from 2014, despite an increase in purchase amongst this group.

Purchase Channel

- Supermarkets continue to increase as the main place of purchase.
- Those in lower income brackets are more likely to purchase mangoes from supermarkets, aligning with decreases in expense barriers and more mango buyers in these brackets.
- Green grocers as the main point of purchase continues to decline, consistent with overall fruit and vegetable retailing trends in Australia.

Purchase Behaviour

- High quality has been a consistent driver of purchase this mango season, both amongst impulse and planned buyers. Specials are becoming more important for prompting Impulse purchasing.
- Out of store purchasing cues are less likely to influence impulse buyers but are essential to maintaining purchasing behavior amongst planned mango buyers.
- Expense perceptions is the biggest barrier to increasing consumption amongst existing mango buyers.

Perceptions of Quality by State

- Satisfaction levels of all quality metrics is relatively inline with what was seen in 2017, with the exception of skin and colour of the mangoes which are both significantly higher than what was seen in the previous read.
- Victoria consistently has been more likely to have lower satisfaction proportions across the quality metrics, however, has seen significant increases from 2017.

- Range is ranked last on the list of quality attributes in terms of satisfaction.

Usage Occasions

- Usage occasions have remained stable from 2017, with a slight increase in frequency of consuming mango fresh on their own (not overall incidence though).
- Queenslanders consume mangoes at a wider variety of mealtimes, especially breakfast and as a snack. Targeted communications could increase this in NSW and Victoria.
- The repertoire of usage occasions has seen a slight drop from 2017. Encourage purchase frequency by giving consumers more reason to use mangoes.

Refereed scientific publications

NA

References

NA

Intellectual property, commercialisation and confidentiality

No project IP, project outputs, commercialisation or confidentiality issues to report

Appendices

Full Report – Consumer Preference Study 2020

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Strategic levy investment

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Consumer Preference Study – 2020

Prepared for: Tate Connolly & Adam Briggs
By: Sprout Research

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Introduction and methodology

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Over this time Sprout Research has utilised a number of methodologies to establish and track, purchase incidence, purchase drivers, usage occasions and profiles.

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In 2017 and 2020, the methodology has been switched to a 'fully' online methodology as companies that have offered CATI omnibus surveys in the past have discontinued them for the following reasons: -

- The incidence of fix line telephones (which CATI makes use of) is declining in Australia, and the number of mobile-only phone users is on the increase.
- Mobile phone users also differ from fixed-line only phone users – they tend to be younger, singles/couples and renting.

Whilst a standalone ad hoc CATI survey would be possible – the cost would be significantly more than the syndicated, shared cost approach used in an omnibus

Methodology considerations

Online panel research has evolved significantly, allowing Sprout to conduct robust and representative research studies using this method. With any consideration in a change in methodology in a study such as the one for HIA, it is important to understand that the change itself could contribute to any changes in the survey results.

How could our results potentially be influenced by the change in methodology, and what can be done to minimise this?

- Opinion and perception questions are often most influenced, due to a slightly different profile of people being accessed. In addition, response patterns can differ in Telephone vs. Online (self-completion), where respondents tend to be slightly more positive when speaking to an interviewer compared to self-completing questions.
- For HIA, the previous years' research on the perception/opinion questions, were also conducted online – therefore there is no change in methodology here.
- Usage and awareness questions can be influenced, if the brand usage /awareness of people who are online differ significantly from those who are not online (and would thus be excluded from an online survey).
- Over 85% of the Australian population have access to the internet. This high incidence indicates that we will not be excluding a significant portion of the population by conducting a survey online. Our survey will continue to be weighted to represent the population age, highest level of schooling completed, gender and location.

2020 Objective

The overall objective of this Consumer Preference Study is to understand and measure the purchasing patterns and the incidence of the Australian mango buyer. The results will provide HIA and the mango industry with valuable and measurable insights from which marketing and communication programs can be developed.

More specifically, the research will provide an understanding of:

- Purchase incidence and frequency
- Profile of mango consumers – understanding of who in the household is consuming mangoes
- Consumption occasions – understanding of how mangoes are being consumed within the household
- Triggers and barriers to purchase – including confidence, taste, value, health etc.
- Attitudes to health and nutrition
- Profile of purchase occasions – where are they purchasing and why?
- Varietal awareness

As an ongoing study, findings from the 2020 research will be benchmarked against the 2017 findings to draw comparisons between the years in order to gain a better understanding of trends and drivers.

Mango Purchasing Incidence

Online Study : 2009, 2011, 2012, 2013, 2014, 2017, 2020

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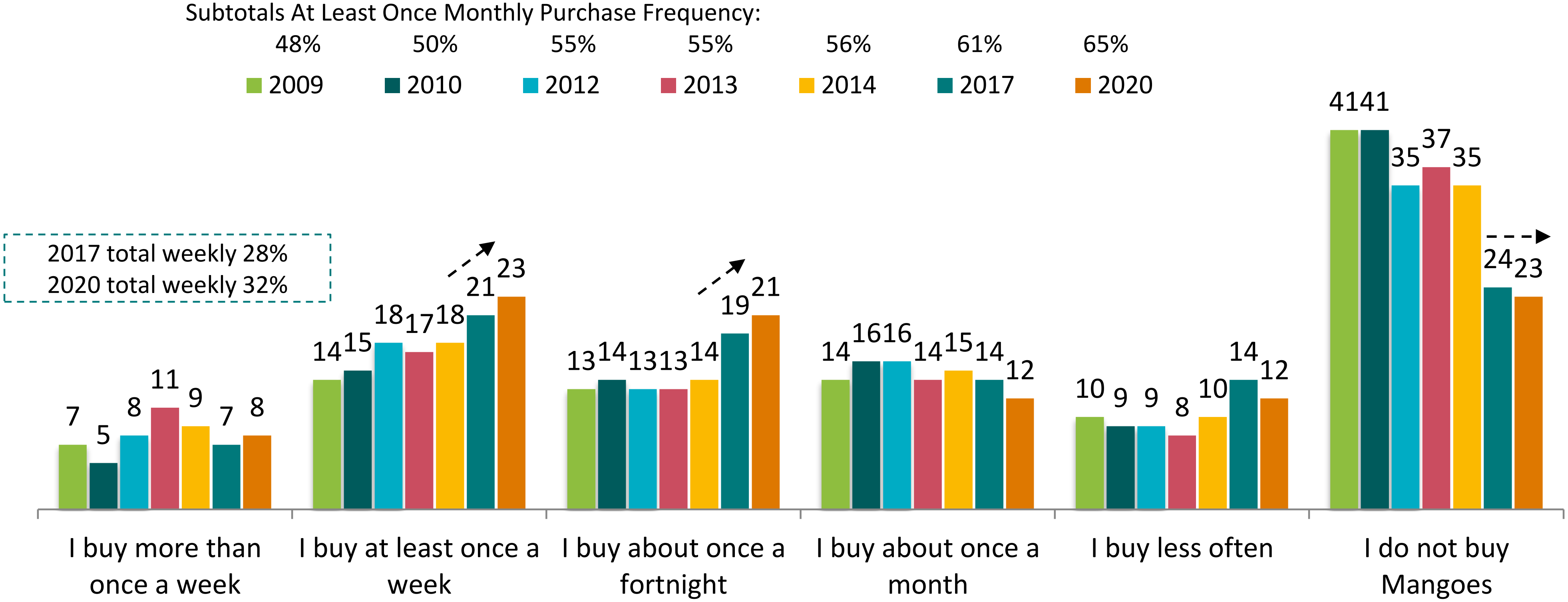
Mango Purchase Incidence

Whilst overall mango purchasing incidence has remained steady, it appears consumers are converting into higher purchase frequencies. Both at least weekly and fortnightly purchasing have increased from 2017, whilst lower frequencies have decreased. This could indicate market penetration limit has been reached, however there is still opportunity to continue converting consumers into higher purchase frequencies and grow the market.



= Sig Testing 95% CI against previous read

Base Total 2020 n=1199

Q1 Now thinking about fresh mangoes. How often, if at all, have you personally purchased fresh mangoes this summer? Would it be...?

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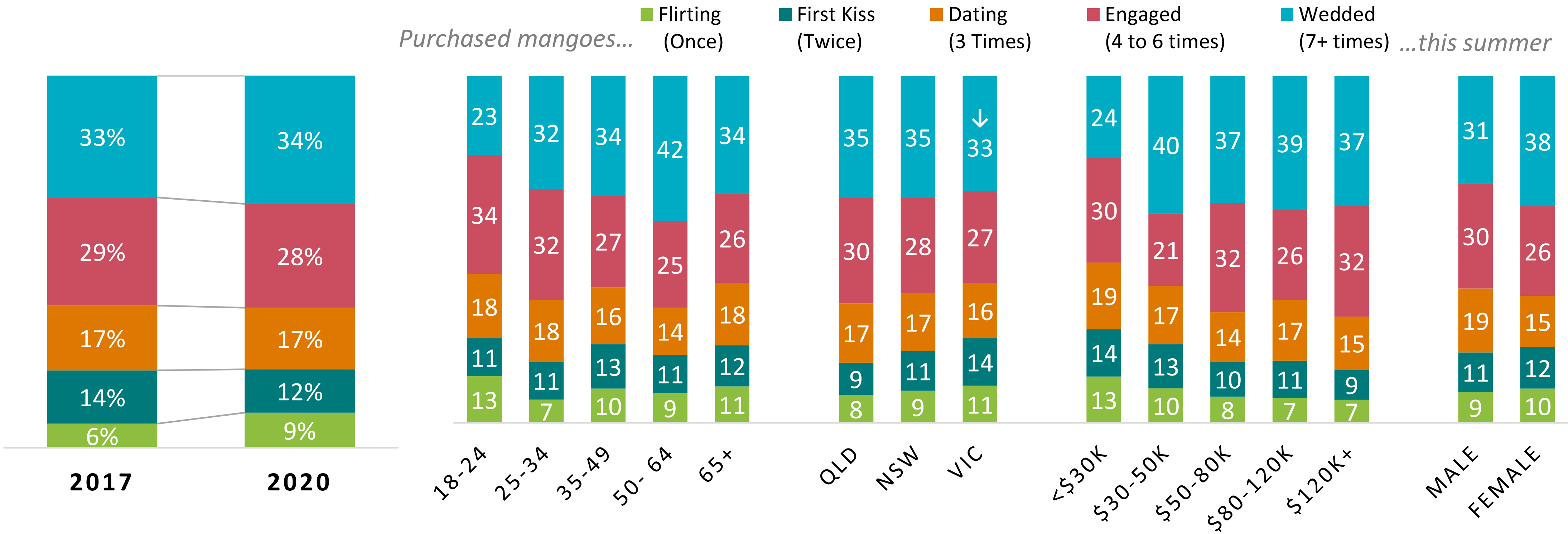
1 in 3 have purchased fresh mangoes 7+ TIMES this summer

Those aged 50 to 64 are more likely to have purchased more mangoes than other age groups. Expense appears to be a barrier to driving purchase rates, with those in the <$30k income bracket being significantly less likely to have purchased mangoes 7+ times this summer.



↑ ↓ = Sig Testing 95% CI against total

Base 2020 n=1199

U4. Thinking again about fresh mangoes. How often, if at all have you personally purchased fresh mangoes this summer? Would it be ...?

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Mango Purchase Incidence & Frequency

Key insights

Mango purchasing frequency has increased from 2017.

There have also been slight increases in single purchasing frequencies, driven mainly by younger buyers.

Purchase incidence has remained unchanged from 2017, which could indicate the market penetration limit has been reached.

Awareness & Knowledge

Online Study : 2009, 2011, 2012, 2013, 2014, 2017, 2020

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Consumer Awareness

2020

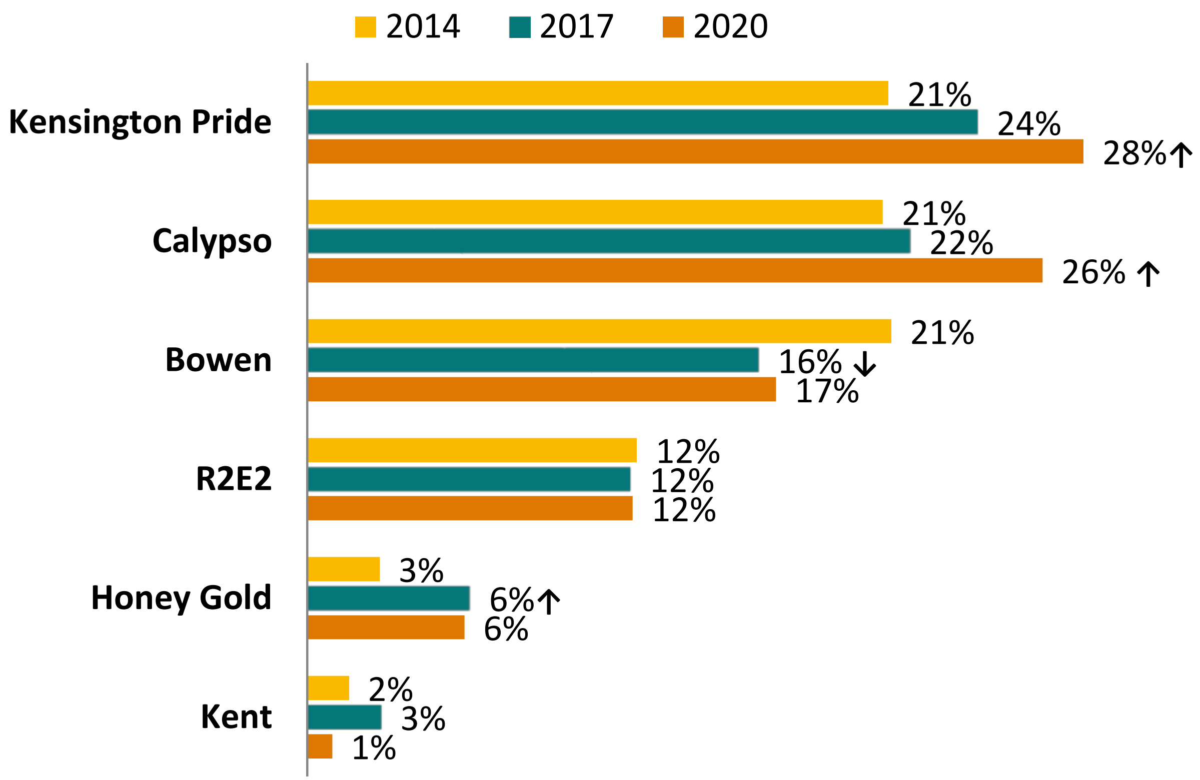
- Wider variety of mango types mentioned this year - Kensington Pride and Calypso mangoes however, continue to be the most top of mind.
- 35% of consumers were unable to name a type or variety of mango, down from 2017.

2017

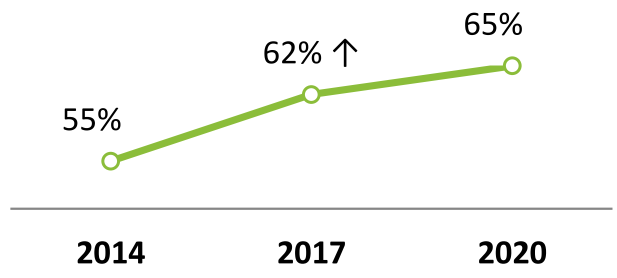
2014

Base Total 2017 n=1,200
A1 Which different types or varieties of mangoes, if any, can you think of?

Consumer Awareness



OVERALL VARIETAL AWARENESS (UNPROMPTED)

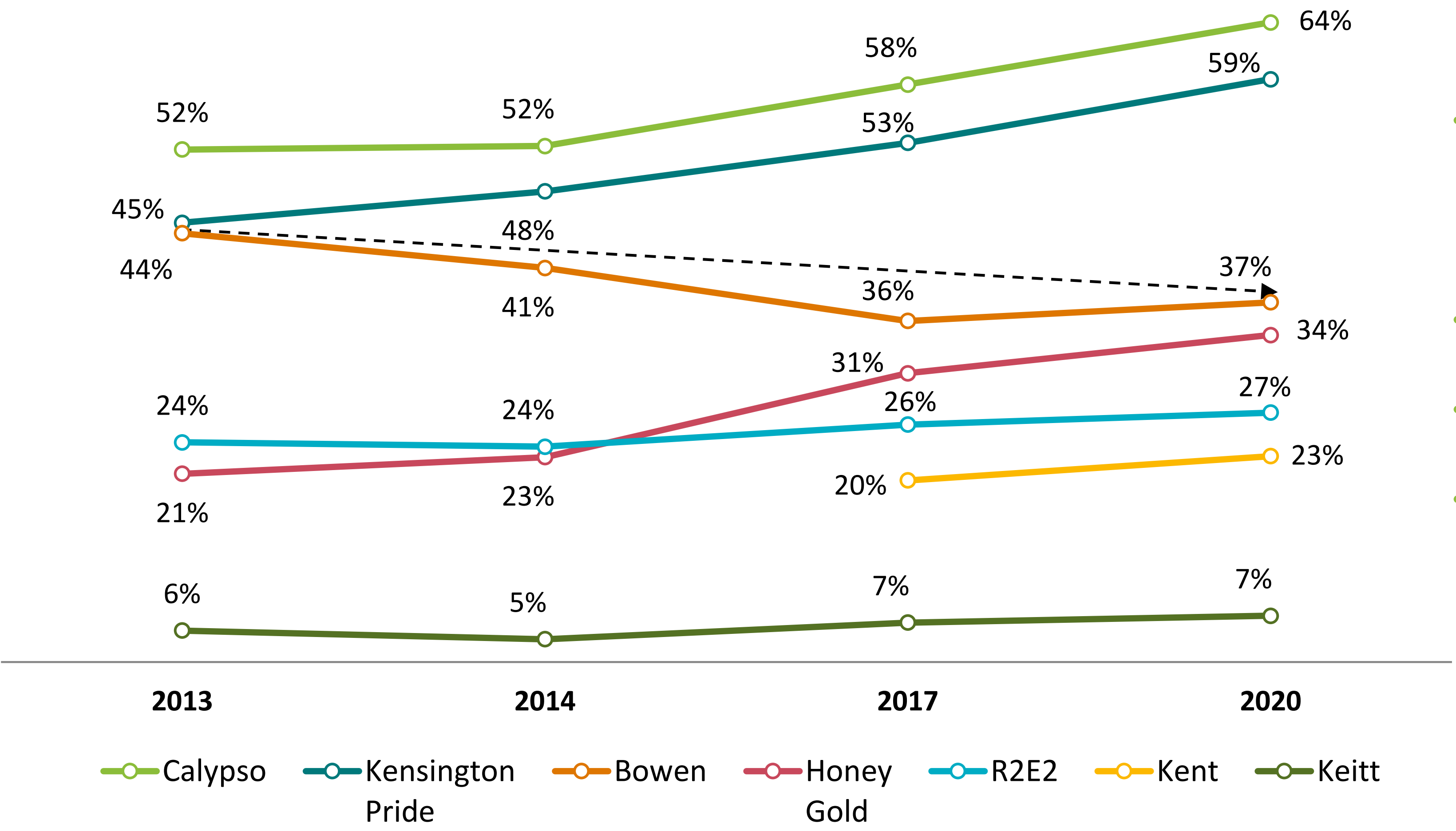


- **Kensington Pride** and **Calypso** continue to be the most recalled and are significantly more likely to be recalled in 2020 compared to 2017.
- Awareness of **Bowen** and **Honey Gold** mangoes has remained consistent following significant changes in 2017.
- In retailer communications, references to **Bowen** mangoes has reduced in recent years, instead being referred to as **Kensington Pride**. This shift in reflected in the unprompted varietal awareness.

Base Total 2014 n=1200; 2017 n=1197; 2020 n=1565
A1 Which different types or varieties of mangoes, if any, can you think of?

↑ ↓ = Sig Testing 95% CI against previous read

Mango Awareness – 2013, 2014, 2017, 2020



- When prompted, **Calypso** mangoes have the highest awareness, followed closely by **Kensington Pride**. Both have seen significant increases read-on-read.
- Awareness of **R2E2** and **Kent** varieties has significantly increased since 2017.
- Palmer, Keitt, Pearl and Brooks continue to be largely unknown.
- The shift from Bowen mangoes to Kensington Pride naming is more evident in prompted awareness, with Bowen the only variety to see a downward trend.

Base: Total 2014 n=1200; 2017 n=1197; 2020 n=1565
A2 Which different types of mangoes, if any have you heard of before now?

↑ ↓ = Sig Testing 95% CI against previous read

Note: New brands included to the study in 2017 Pearl; Palmer; Kent; Brooks

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Awareness of Mangoes

Key insights

Overall varietal awareness has increased, with more consumers able to identify varieties unprompted. This appears to be driven by increases in Kensington Pride and Calypso recall.

Prompted varietal awareness is nearly three-fold unprompted and follows the same trends, generally increasing year-on-year for most varieties.

Unprompted and prompted awareness of Bowen mangoes has remained stagnant after it saw major drops in 2017. This is likely due to a shift in naming to Kensington Pride.

Buyer Profile

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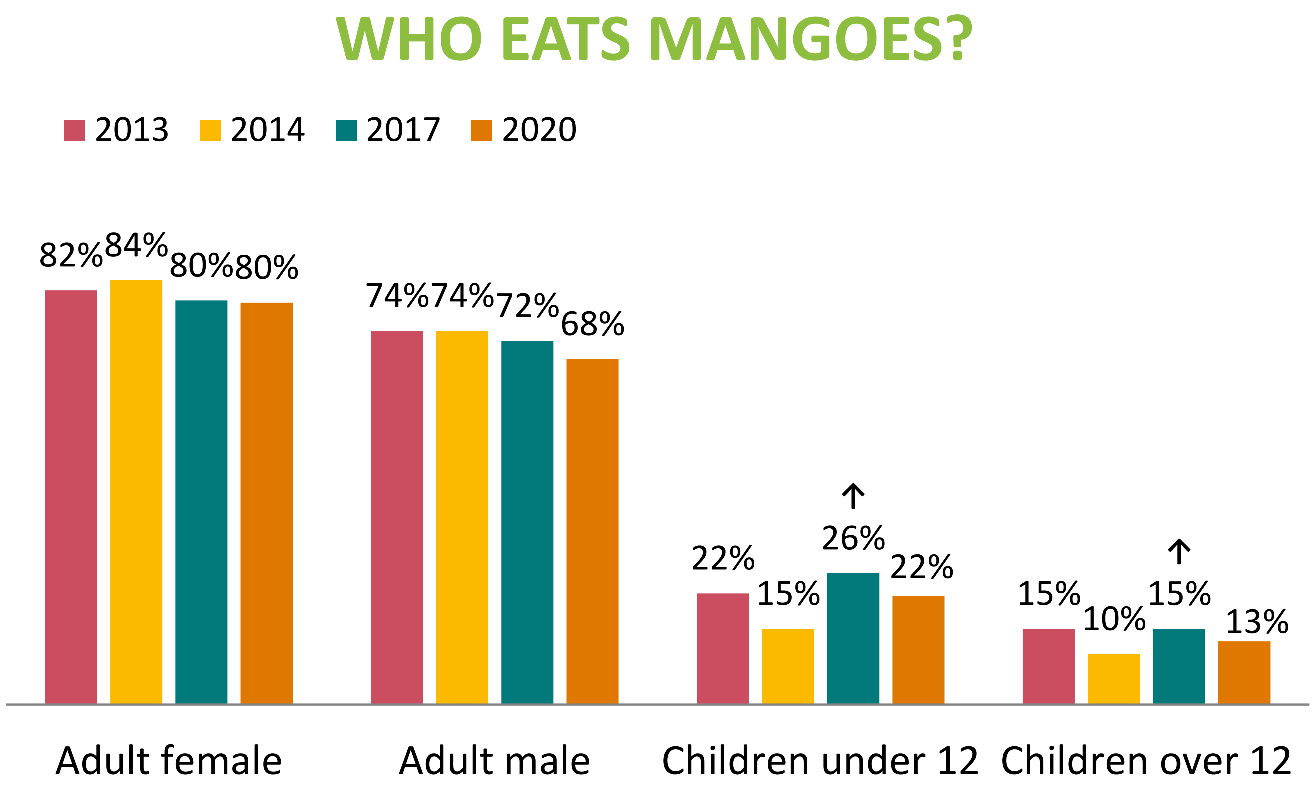
Household consumption



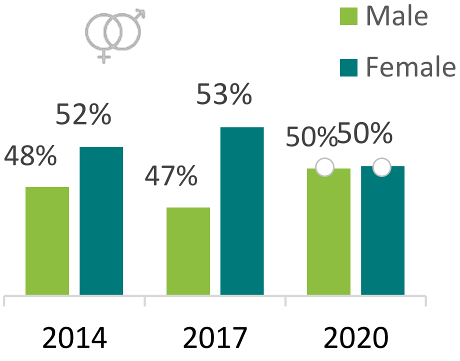
- Remaining consistent with 2017, adult females continue to be the most likely person in the household to consume mangoes followed by adult males.
- Consumption by adult males has seen steady decreases read-on-read.
- Younger children continue to eat mangoes more than older children
- Overall consumption by children has dropped slightly since 2017.

↑ ↓ = Sig Testing 95% CI against previous read

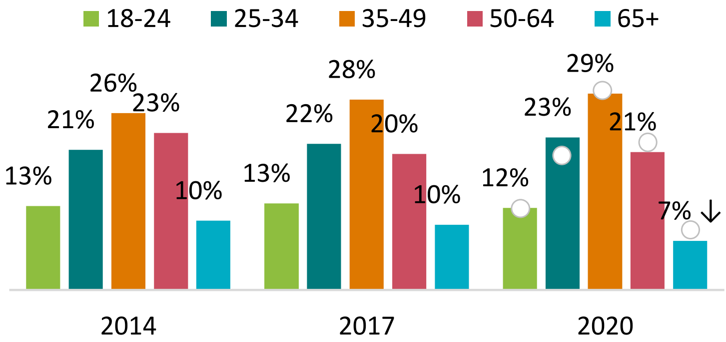
Base 2014 n=793; 2017 n=908; 2020 n=1199
U3 ...and who in your household eat MANGOES? Please tick all that apply.

Mango Buyer Profile

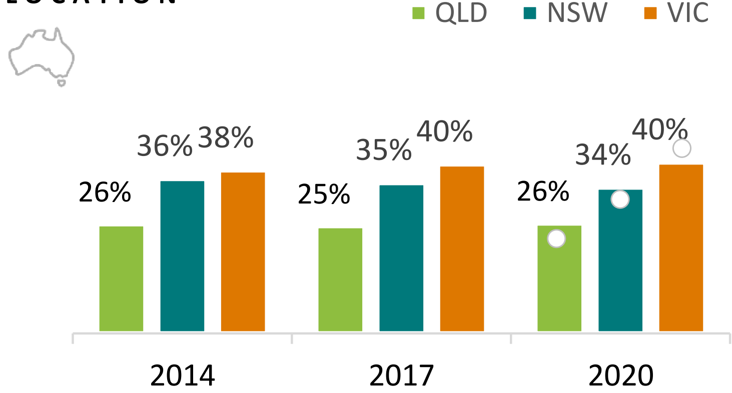
GENDER



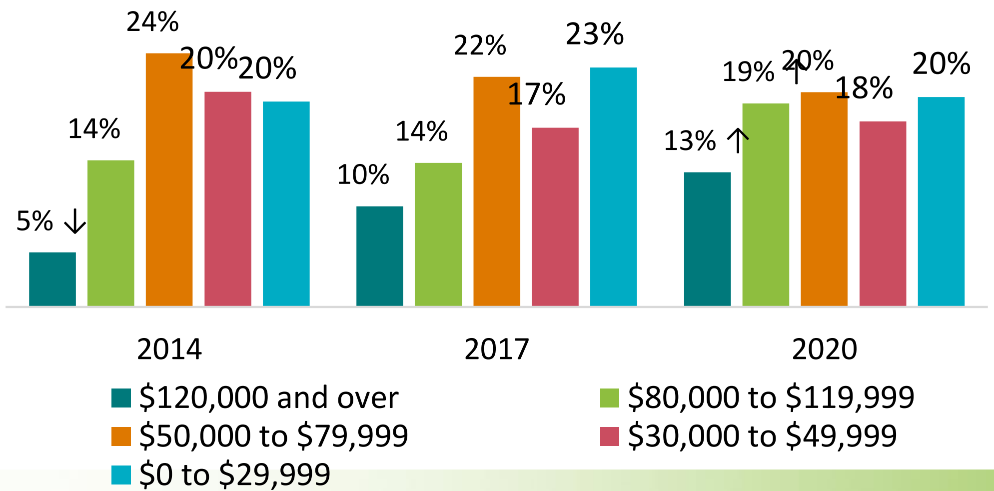
AGE GROUP



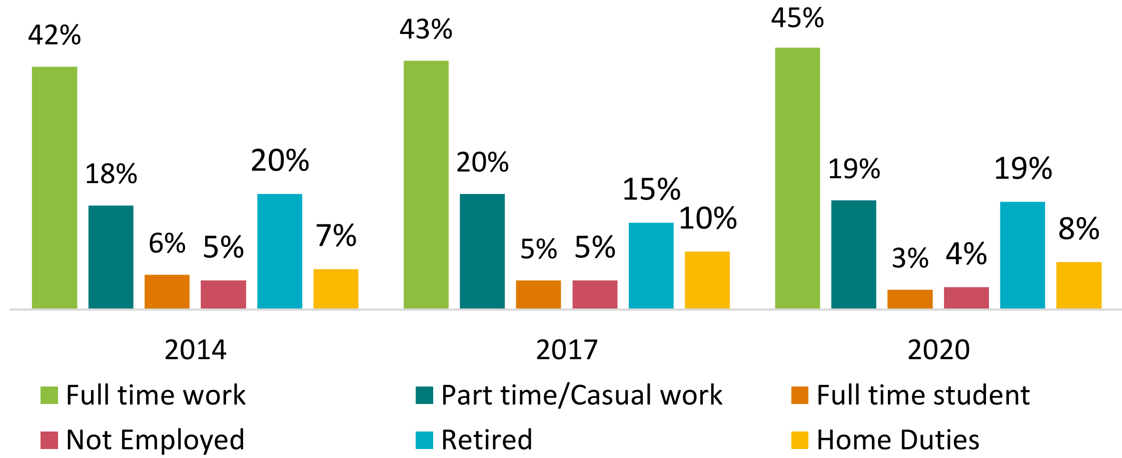
LOCATION



INCOME



EMPLOYMENT STATUS



Australian Population

↑ ↓ = Sig Testing 95% CI against previous read

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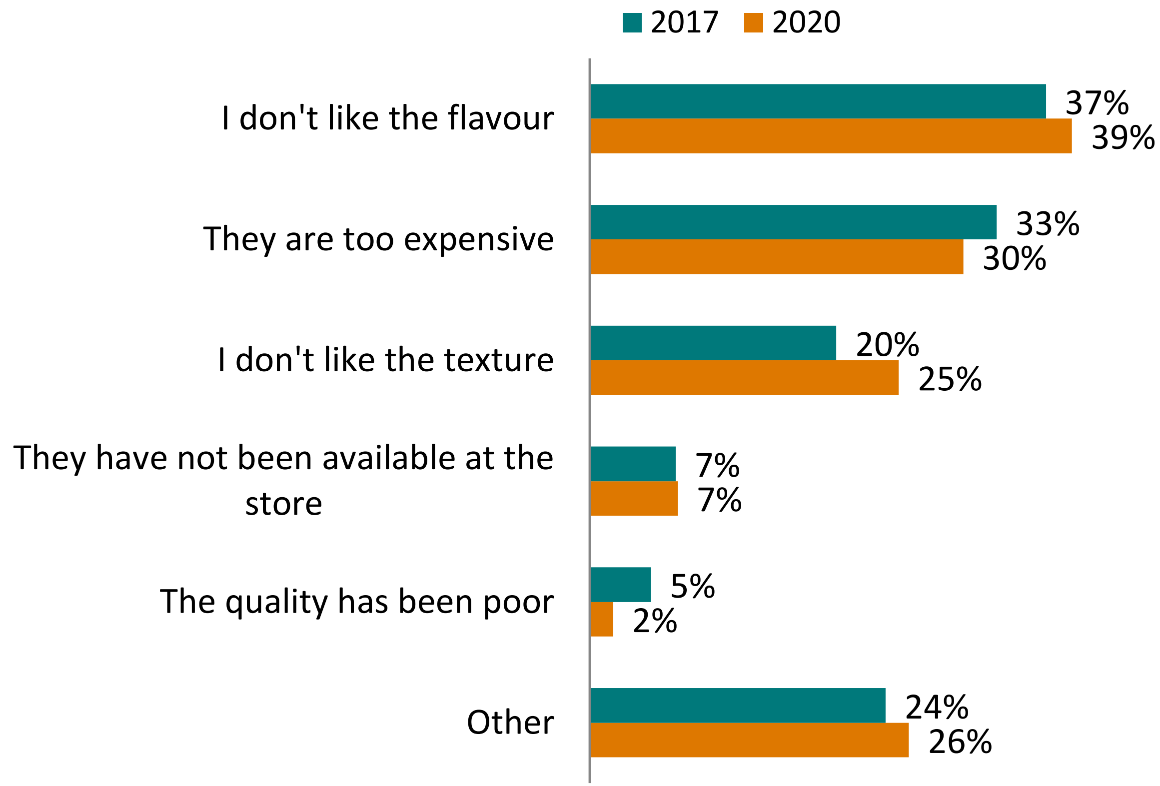
Base Total 2014 n=793, 2017 n=910; 2020 n=1199

Reasons for not buying mangoes



Other: It's too much for me, It's messy, Prefer other fruit/don't like mangoes; Prefer tinned/juice; I don't do the shopping; Allergies

- Respondents who had not purchased mangoes over the 2016/17 or 2018/19 summer periods were asked which reasons best explain why.
- The main reason for not purchasing mangoes continues to be not liking mangoes.
- Expense continues to be the second largest barrier to purchasing mangoes, however it has seen a slight decrease from 2017.
- Quality and availability were both minor reasons influencing non-purchasing behaviour.

Base Total 2017 n=290; 2020 n=366
G0. You mentioned that you have not personally purchased fresh mangoes this summer. Which reasons below best explain why you have not bought any mangoes?

Buyer Profile

Key insights

Expense as barriers to purchase amongst non-buyers have decreased slightly from 2017. There has been a slight increase in the amount of mango buyers in lower income brackets.

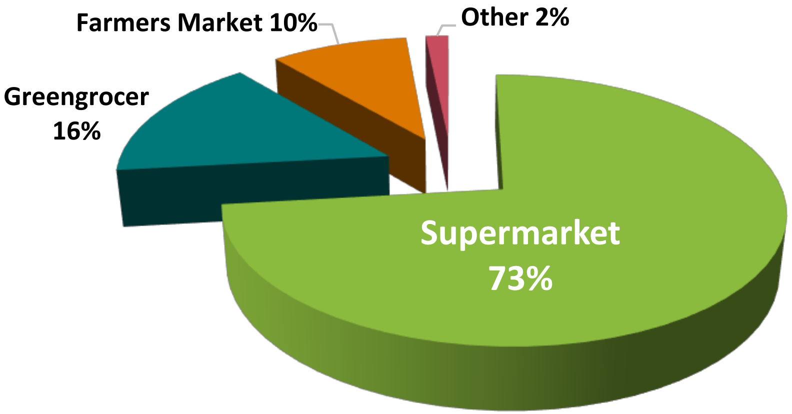
Consumption amongst children has seen a slight drop from 2017; younger children continue to eat more than older children.

Consumption amongst adult males has seen a steady decrease from 2014, despite an increase in purchase amongst this group.

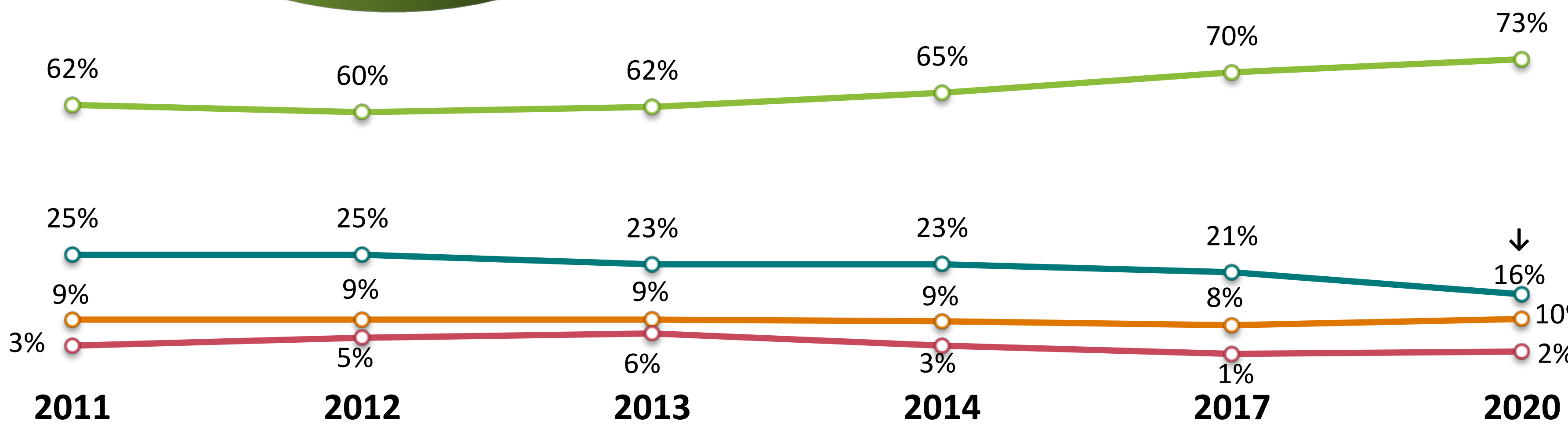
Purchase Channel

Supermarkets continue to erode greengrocer's share of place of purchase

PLACE OF PURCHASE 2020



- This is consistent with the overall trend of contracting green grocer share seen in fruit and vegetable retailing in Australia*.
- Today, 73% buy from a supermarket, an 11% increase since 2011.
- Greengrocer has seen its largest decline as the place of purchase, significantly dropping 5% since 2017.



Base: 2014 n=793; 2017 n=908; 2020 n=1199
Q2 Thinking about the last occasion that you bought MANGOES can you please answer the following questions? On the last occasion, where did you purchase your MANGOES from?
*Source: IBISWorld Industry Report G4122 Fruit and Vegetable Retailing in Australia – March 2019

↑ ↓ = Sig Testing 95% CI against previous read

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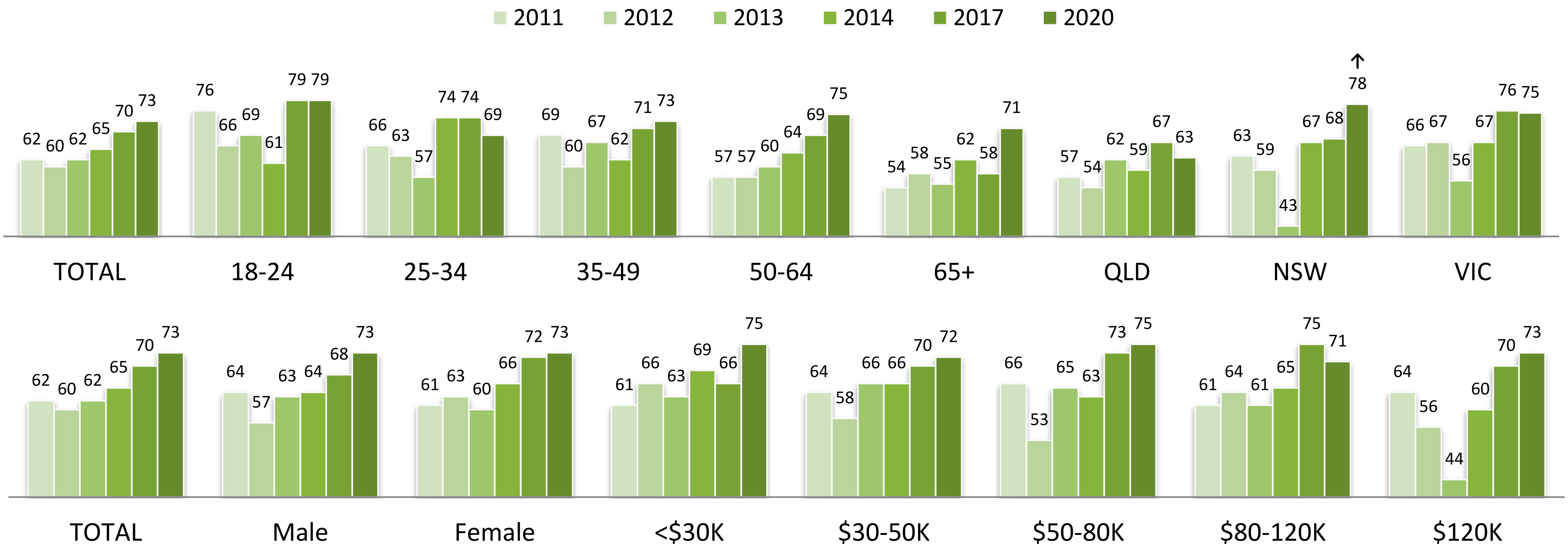
Supermarket Purchases

The continued rise of supermarkets as the primary place of mango purchases appears to be driven by those living in NSW in this latest read. Those aged 18 to 24 years continue to account for the highest percentage, with those aged 25 to 34 years seeing a 5% decrease from 2017. Gender and income do not appear to be driving these shifts.



Base: 2014 n=793; 2017 n=908; 2020 n=1199
Q2 Thinking about the last occasion that you bought MANGOES can you please answer the following questions? On the last occasion, where did you purchase your MANGOES from?

↑ ↓ = Sig Testing 95% CI against previous read

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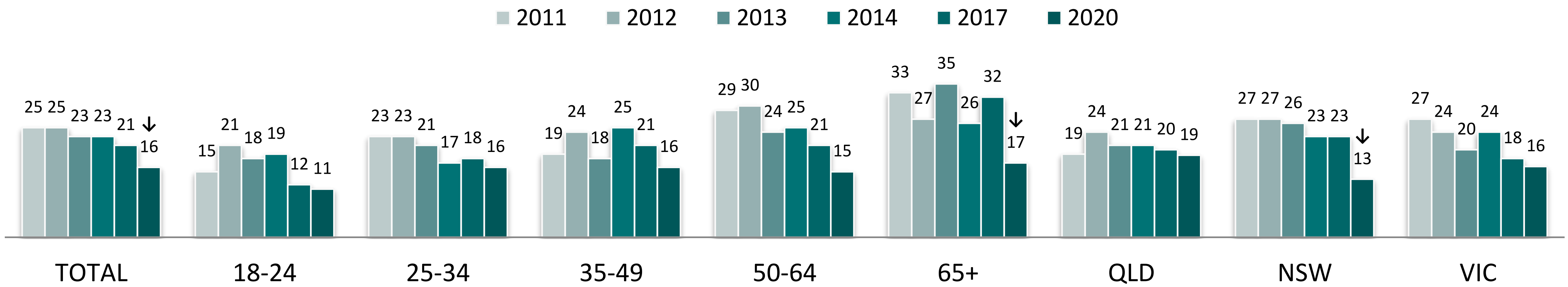
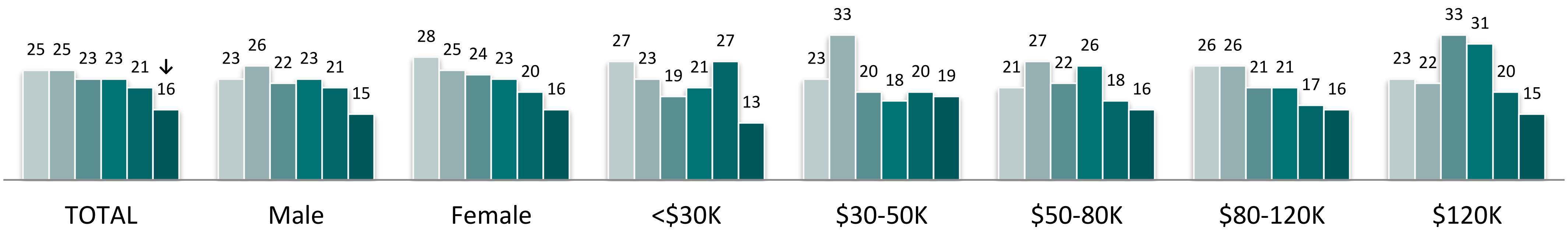
Greengrocer Purchases

Greengrocer's share as a place of purchase has continued to decrease in this read, with the share appearing to go towards supermarkets. The erosion appears to be driven by those aged 65 years and those living in NSW. Gender and income do not appear to be driving these shifts.





Base: 2014 n=793; 2017 n=908; 2020 n=1199
Q2 Thinking about the last occasion that you bought MANGOES can you please answer the following questions? On the last occasion, where did you purchase your MANGOES from?

↑ ↓ = Sig Testing 95% CI against previous read

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Purchase Channel

Key insights

Supermarkets continue to increase as the main place of purchase.

Those in lower income brackets are more likely to purchase mangoes from supermarkets, aligning with decreases in expense barriers and more mango buyers in these brackets.

Green grocers as the main point of purchase continues to decline, consistent with overall fruit and vegetable retailing trends in Australia.

Purchase Behaviour

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What drives mango purchasing?

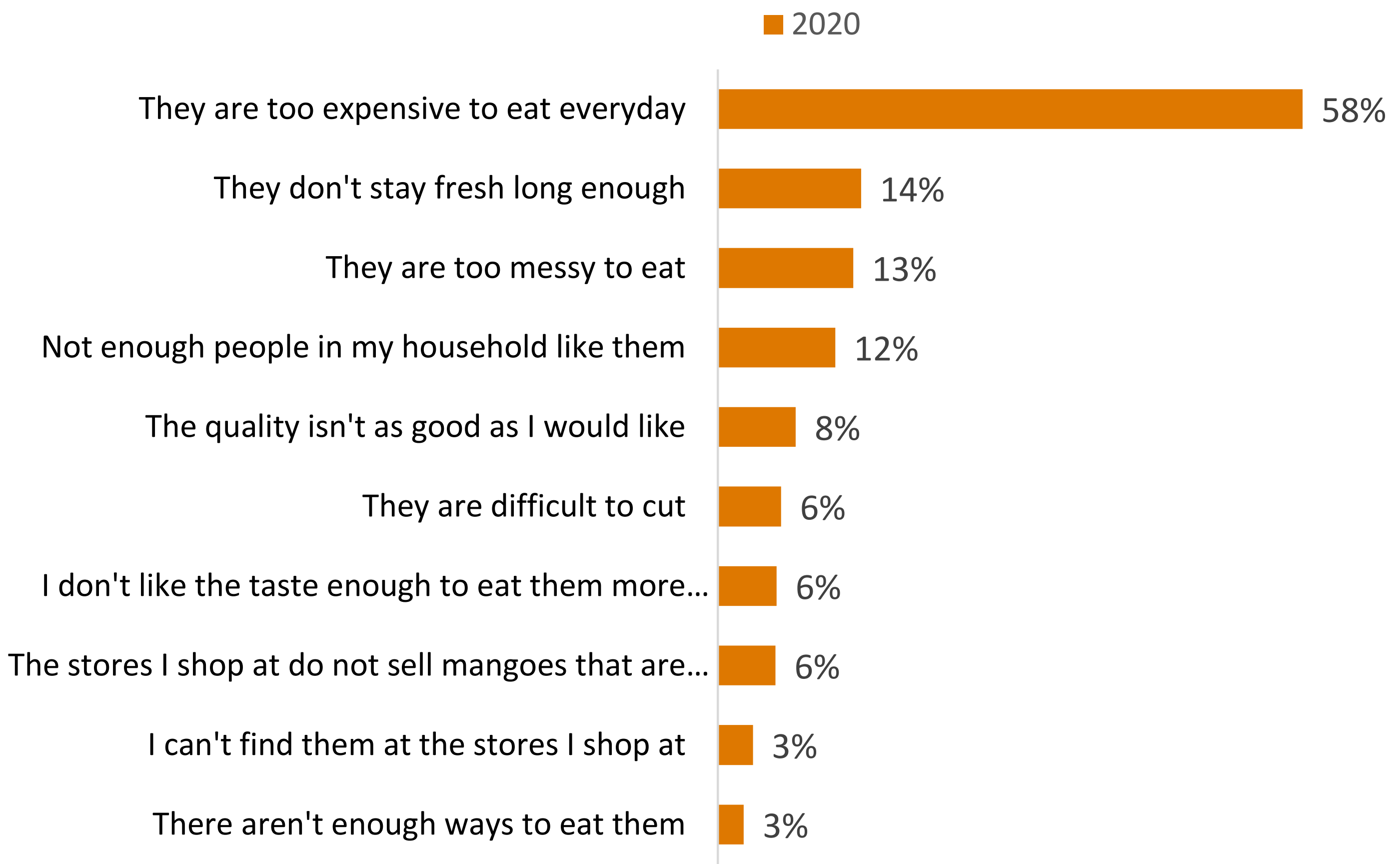
In 2020, we asked mango buyers why they bought mangoes on the last occasion.

- **2 in 5 were inspired by specials**, with general low prices following closely.
- As evidenced by 1 in 5 buying mangoes because they were **needed in the household**, mangoes are likely to make the shopping list.
- However, there is a l**ow prevalence of specific plans** for how the mangoes will be consumed.
- Promotions and advertising appear to have minimal influence on driving mango purchases.

New question in 2020

Base: 2020 n=1199
Q2 Thinking about the last occasion that you bought MANGOES can you please answer the following questions? On the last occasion, where did you purchase your MANGOES from?

3 in 5 perceive expense as a barrier to increasing mango consumption



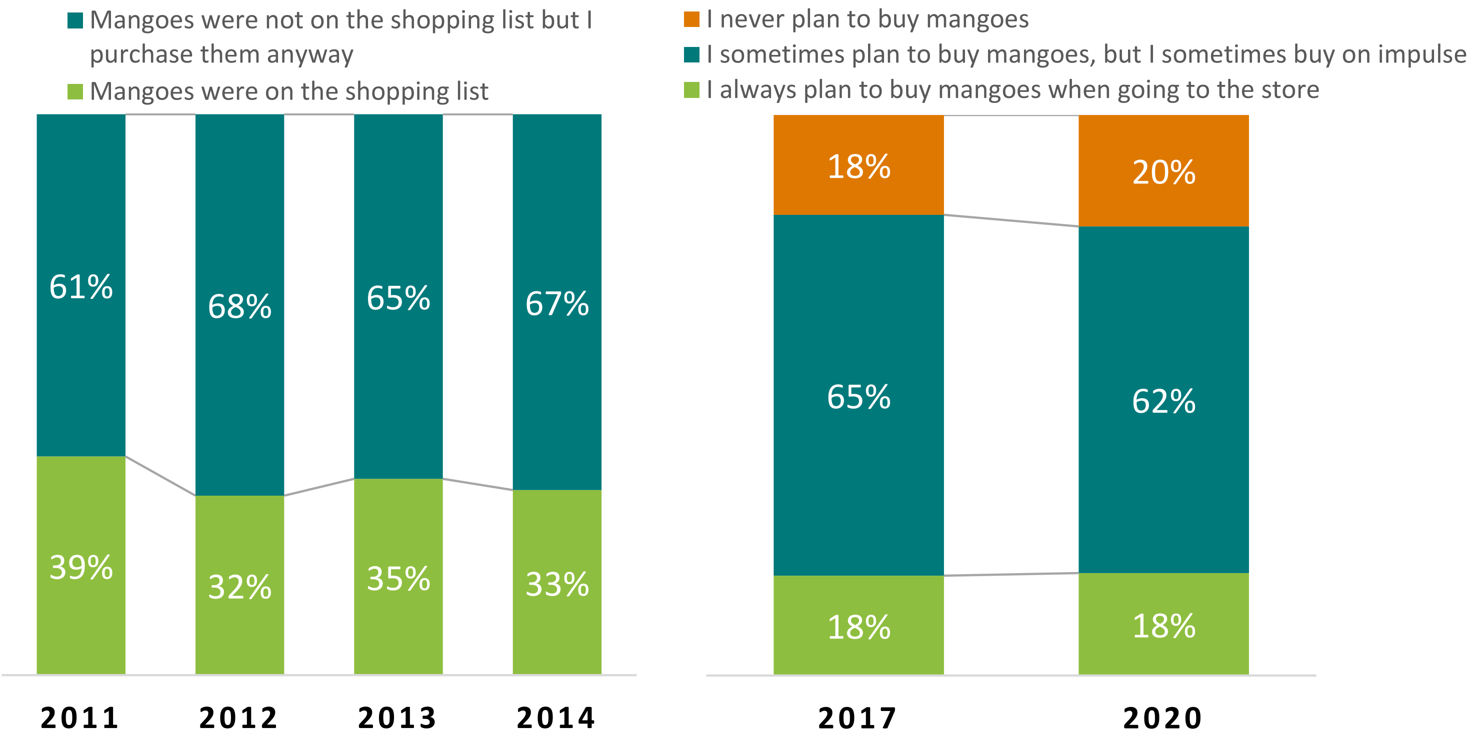
In 2020, we asked mango buyers why they don't eat mangoes more often.

- **3 in 5 perceive expense as a barrier** to increasing consumption, far exceeding other barriers.
- **Post-purchase longevity** is the second largest barrier, followed closely by **too messy** and **consumption saturation** in the household.
- Bad quality mangoes and availability are lower barriers.

New question in 2020

Base: 2020 n=894
U2B - You said that you don't eat MANGOES, why don't you eat MANGOES more often?

4 in 5 sometimes or never plan to purchase mangoes



From 2017, purchase planning was measured differently, so a direct comparison to prior results should be made with care.

- Almost **1 in 5 always plan** to buy mangoes prior to going to the store, **unchanged from 2017**.
- The vast majority 82% (62% sometimes planning and 20% never planning) do not plan ahead when purchasing mangoes.
- This trend continues from prior years – highlighting the critical part the point of purchase plays in the purchase decisions.

Base Total 2011 n=850; 2012 n=864; 2013 n=859; 2014 n=793; 2017 n=910; 2020 n=1199
Up to 2014: U1 Which of the following best describes the planning that went into the last time you purchased MANGOES?
From 2017: Q3. Which of the following best describes the planning involved when you purchase MANGOES?

↑ ↓ = Sig Testing 95% CI against previous read

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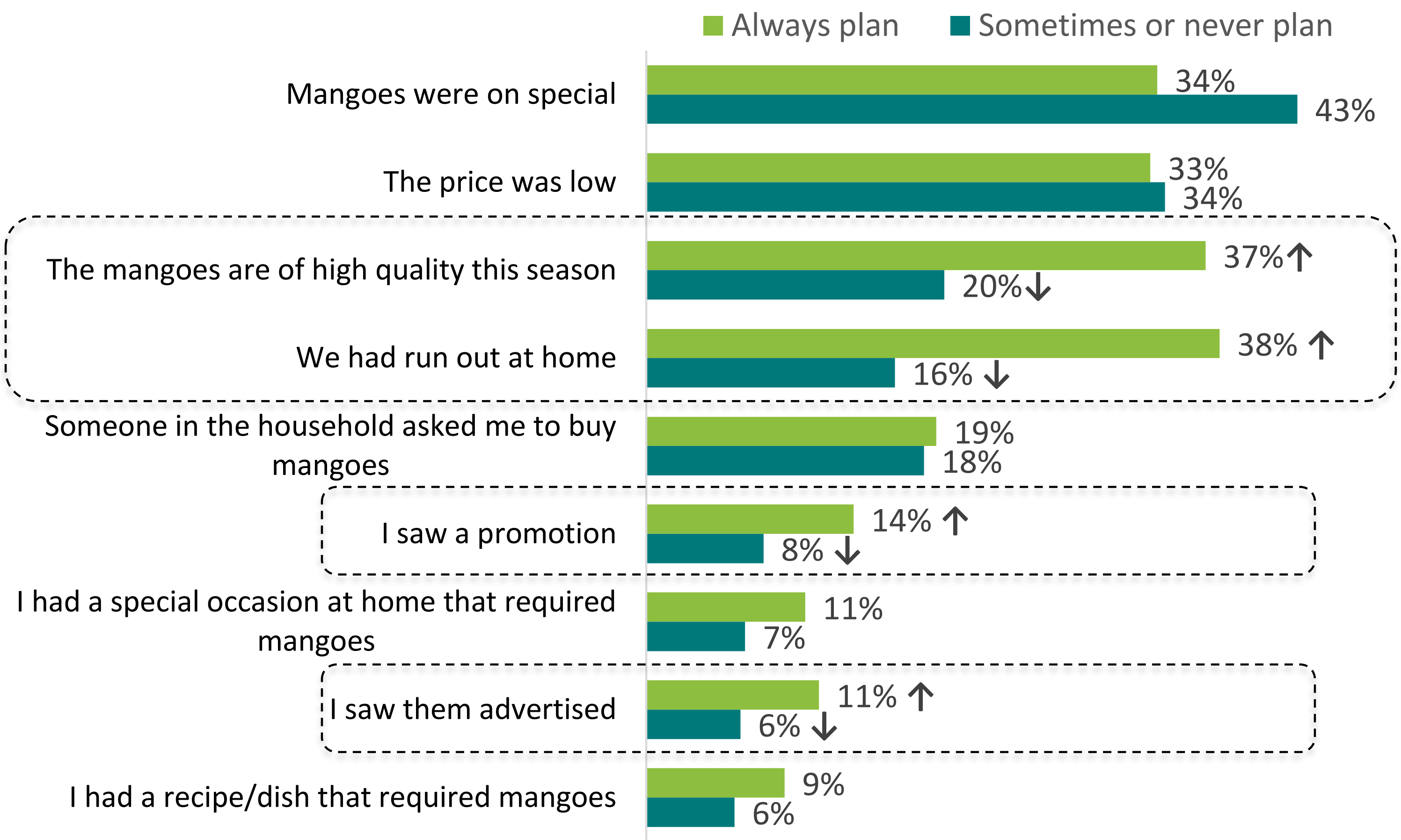
...and are less likely to be driven to purchase by out of store cues



In 2020, we asked mango buyers why they bought mangoes on the last occasion.

- **Impulse buyers** are more driven by specials than planned buyers.
- **Planned buyers** have an identified need for mangoes prior to entering the store, and therefore are more likely to the purchase decision based on the mangoes themselves (e.g. quality).
- Maintaining purchase frequency amongst **planned buyers** is dependent on promotions and advertising, more so than in store or display cues.

Base: 2020 n=1199
Q2 Thinking about the last occasion that you bought MANGOES can you please answer the following questions? On the last occasion, where did you purchase your MANGOES from?

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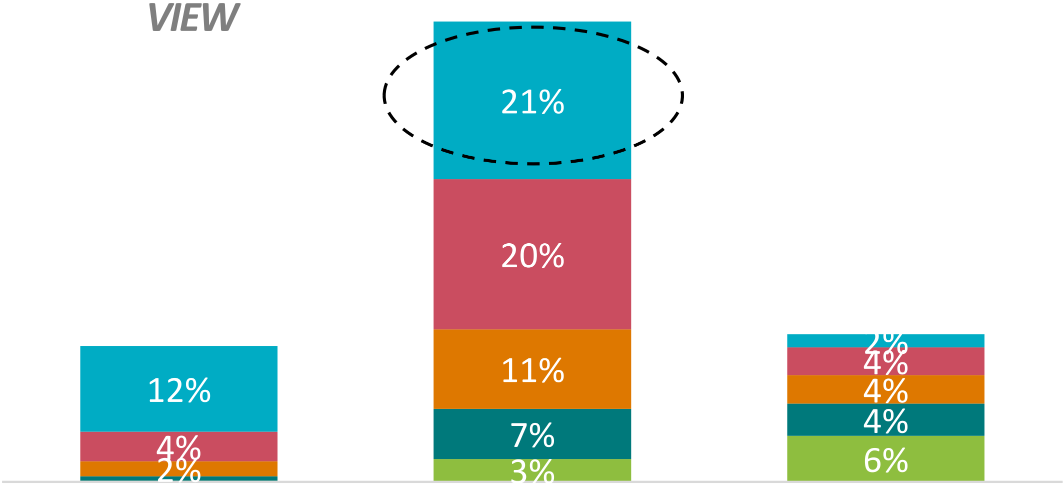
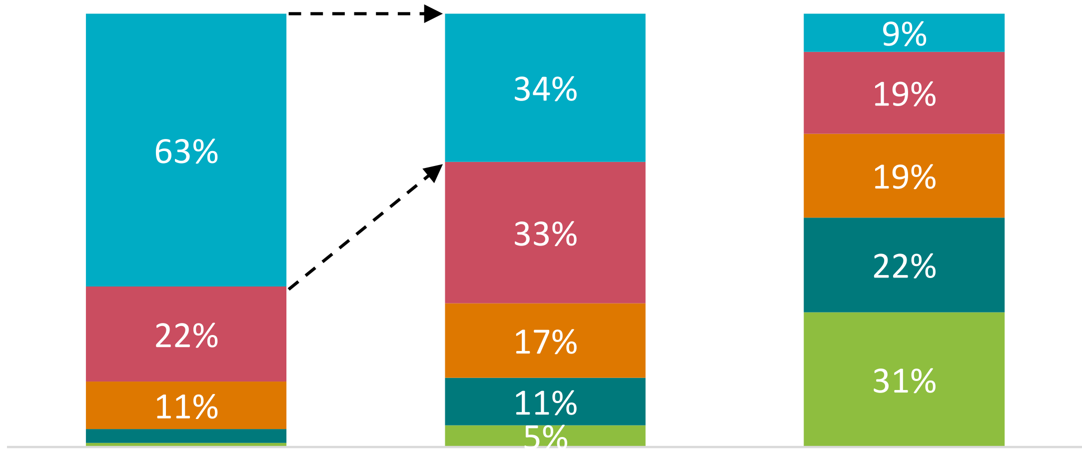
...however, maintaining out of store cues is still important to drive purchase frequency through providing prompts

Those who sometimes plan represent the majority of mango purchases this summer, but when looking *within* this group, we can see that there is still an opportunity to increase purchase frequency.

PURCHASE FREQUENCY BY BUYER TYPE, TOTAL MARKET VIEW



PURCHASE FREQUENCY, WITHIN BUYER TYPE



Purchased mangoes… Flirting (Once) | First Kiss (Twice) | Dating (3 Times) | Engaged (4 to 6 times) | Wedded (7+ times) *…this summe*

↑ ↓ = Sig Testing 95% CI against total

Base 2020 n=1199
U4. Thinking again about fresh mangoes. How often, if at all have you personally purchased fresh mangoes this summer? Would it be …?

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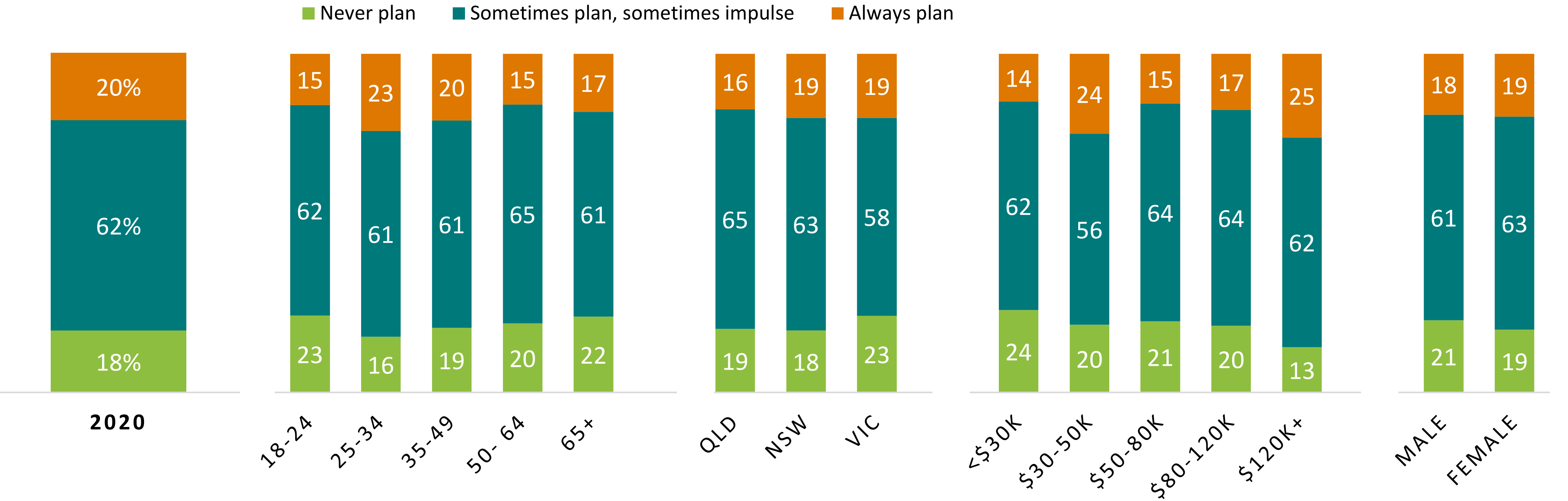
Purchase Planning – 2020

Consumers consistently planning are more likely to be 25-34 years old, and those earning $30-50k or $120k+.

Those who never plan tend to be older (50-64 years) and those earning under $30k. This, in conjunction with lower levels of planned purchase, could indicate that purchases amongst these groups are more likely to be dictated by in-store prices.

There are no regional nor gender skews on purchase planning.



Base Total 2020 n= 1199; 18-24 n=119; 25-34 n=237; 35-49 n=335; 50-64 n=280; 65+ n=228; QLD n=299; NSW n=498; VIC n=402; <$30K n=255; $30-50K n=220; $50-80K n=238; $80-120K n=223; $120k+ n=250; Male n=562; Female n=637
Q3. Which of the following best describes the planning involved when you purchase MANGOES?

↑ ↓ = Sig Testing 95% CI against total

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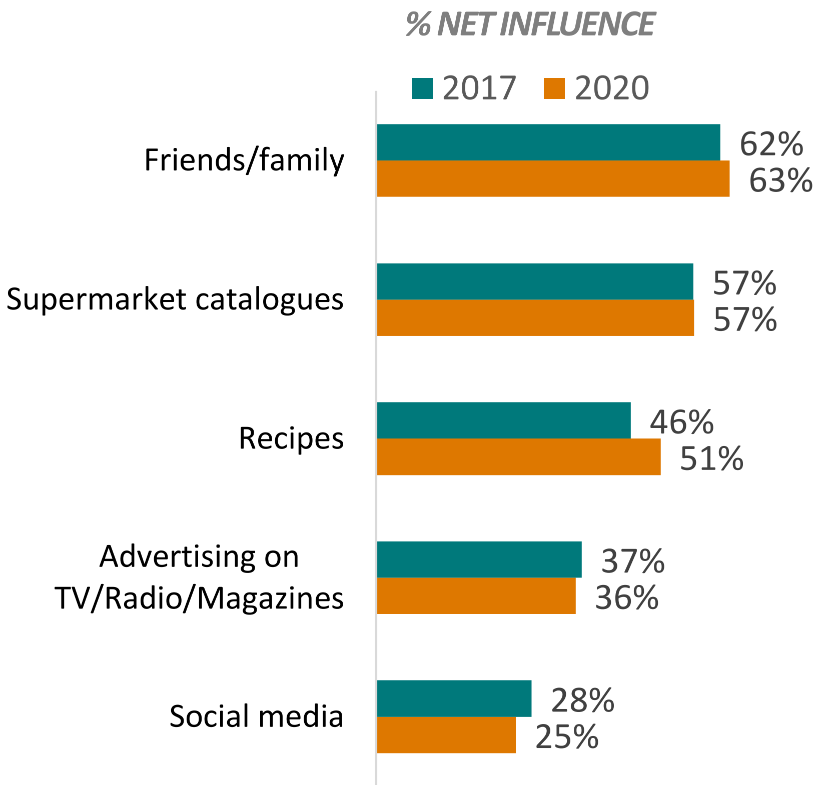
What entices mango purchasing?



Amongst those who plan to purchase mangoes prior to going in-store, **2 in 3 are influenced by friends and family,** followed closely by **supermarket catalogues** and **recipes**.

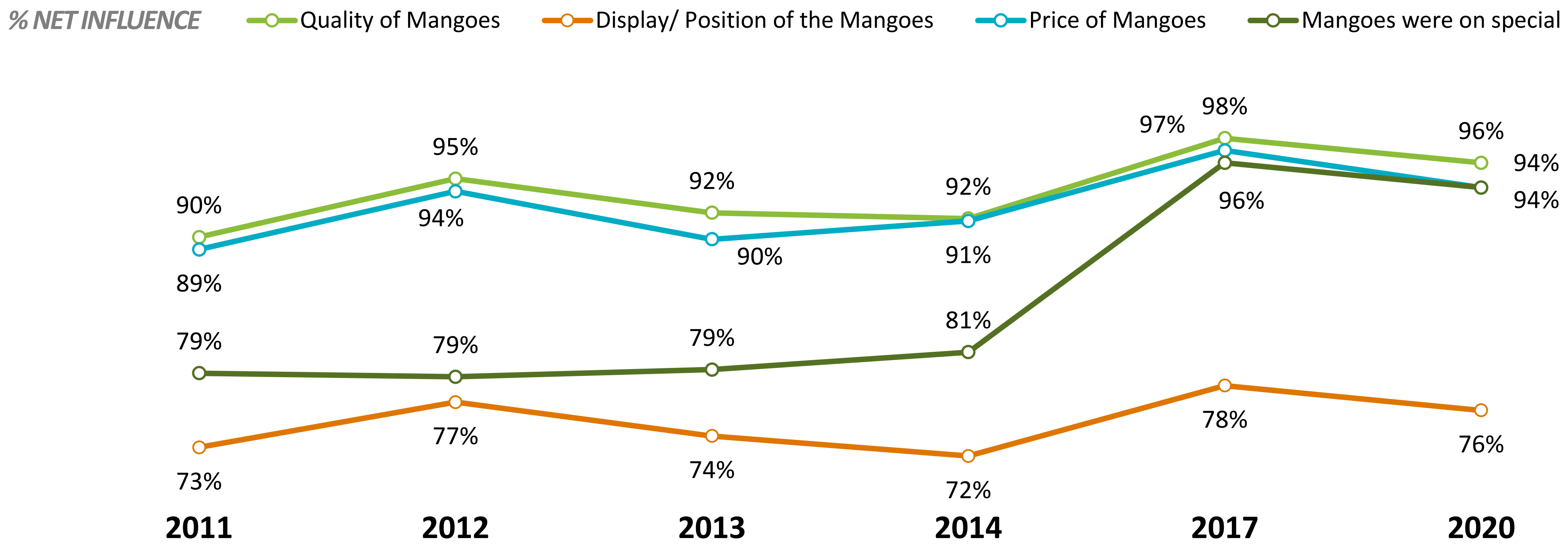
Base Total 2002 n=219

Q5. Which of the following, if any, influence you to buy mangoes prior to going in-store? (NET MAJOR/MINOR INFLUENCE)

↑ ↓ = Sig Testing 95% CI against previous read

What are influences of mango purchase whilst in store?

Amongst those who purchase on impulse, main purchase drivers in store continue to be **QUALITY** (96%) and **PRICE** (94%).
Mangoes being on special has also grown in importance and is inline with 'Price of Mangoes' this read.



↑
= Sig Testing 95% CI against previous read
↓

Base Total 2011 n=518; 2012 n=587; 2013 n= 560; 2014 n=528; 2017; 2020 = 980
Q4 You mentioned you did not necessarily plan to buy mangoes which of the following (if any) influenced your decision to buy mangoes on Impulse? (NET MAJOR/MINOR INFLUENCE)

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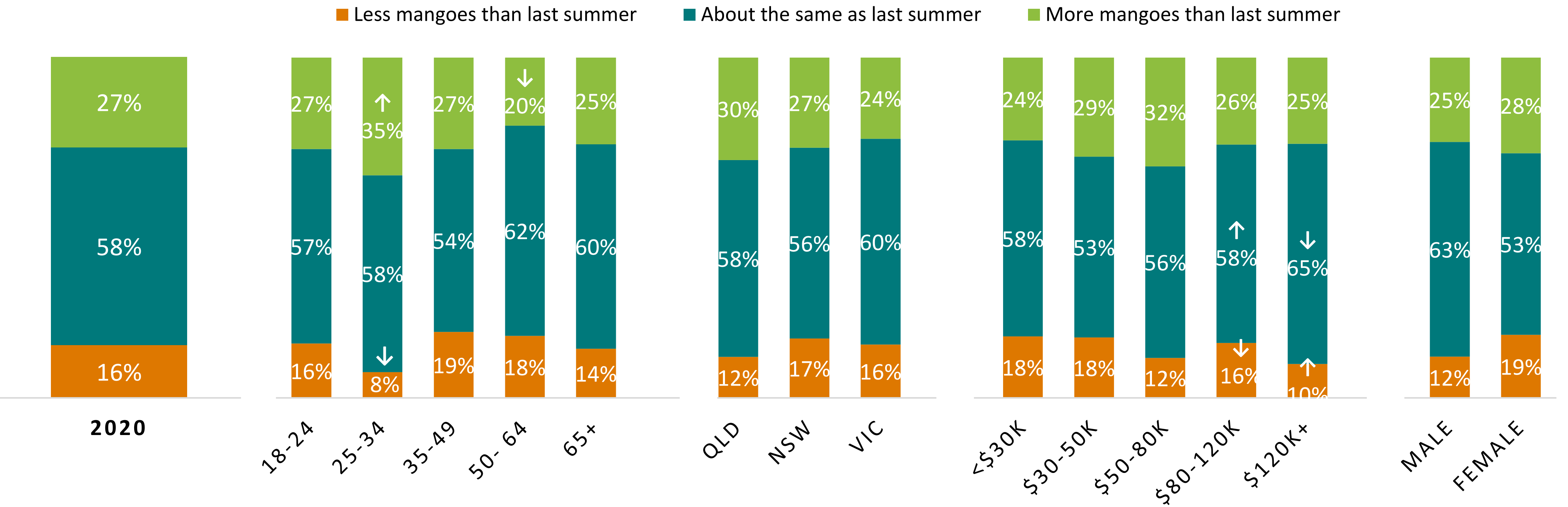
1 in 4 mango buyers increased their purchase volume from last summer

In 2020, we asked mango buyers whether they were buying more, the same amount, or less mangoes than last summer. Those aged 25 to 34 years and males have significantly increased the amount of mangoes purchased compared to last summer.



↑ ↓ = Sig Testing 95% CI against total

Base Total 2002 n=1199
U6. Thinking now about the amount of MANGOES you have purchased this summer, would you say you have purchased more, about the same or less mangoes than you did last summer?

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Purchase Behaviour

Key insights

High quality has been a consistent driver of purchase this mango season, both amongst impulse and planned buyers. Specials are becoming more important for prompting Impulse purchasing.

Out of store purchasing cues are less likely to influence impulse buyers but are essential to maintaining purchasing behavior amongst planned mango buyers.

Expense perceptions is the biggest barrier to increasing consumption amongst existing mango buyers.

Factors of Quality

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What defines quality?

2020 Quality Defined

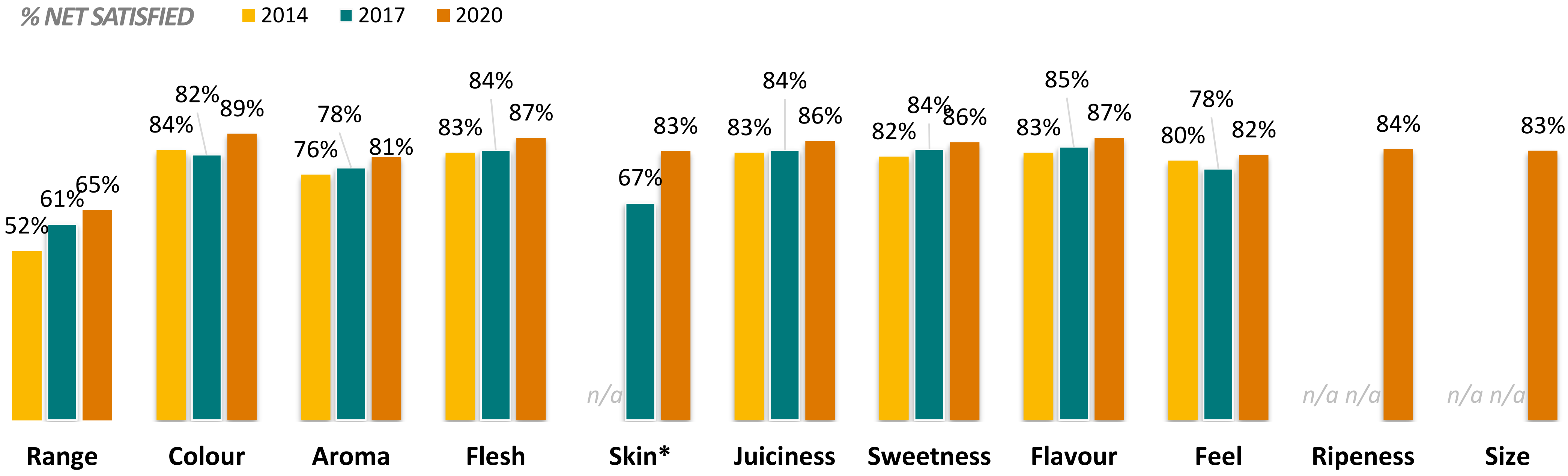
At a topline level, colour, aroma and firm texture continue to be indicators of a good quality mango.

2017 Quality Defined

2014 Quality Defined

Quality of mangoes

Overall satisfaction has seen a steady increase across all quality attributes from 2014. Only 65% were satisfied with the range of mangoes available this summer.



Base Total 2014 n=528; 2017 n=588; 2020 =980

U4ii Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

*Statement updated in 2020

↑ ↓ = Sig Testing 95% CI against previous read

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Quality by State

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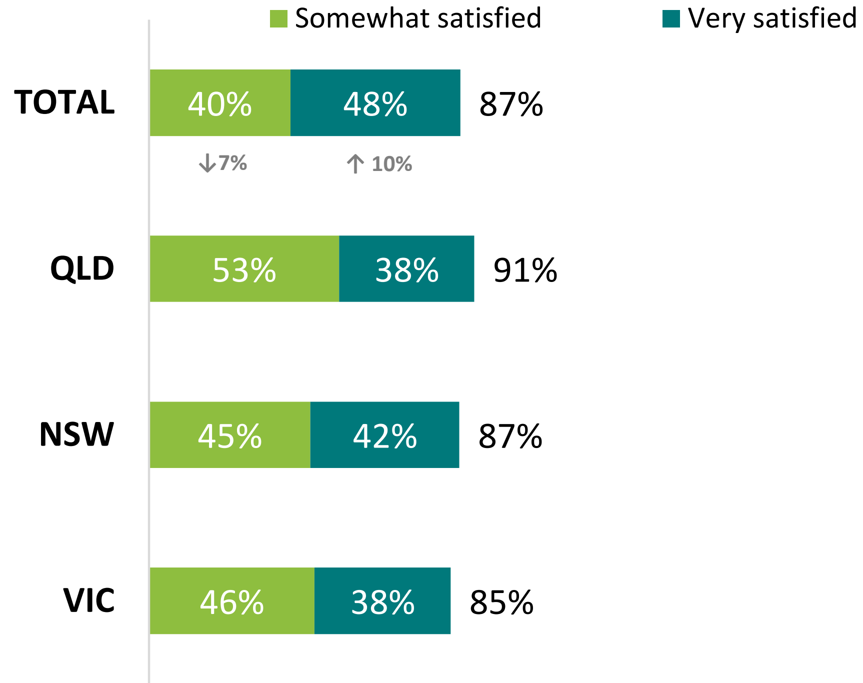
Quality of mangoes

FLAVOUR of the mangoes



- **Queenslanders are more likely to be satisfied** with the flavour of the mangoes this season – with nearly 1 in 2 'very satisfied' with the flavour.
- On a total level, those very satisfied with the flavour has seen a significant increase, while those somewhat satisfied has seen a significant decrease

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

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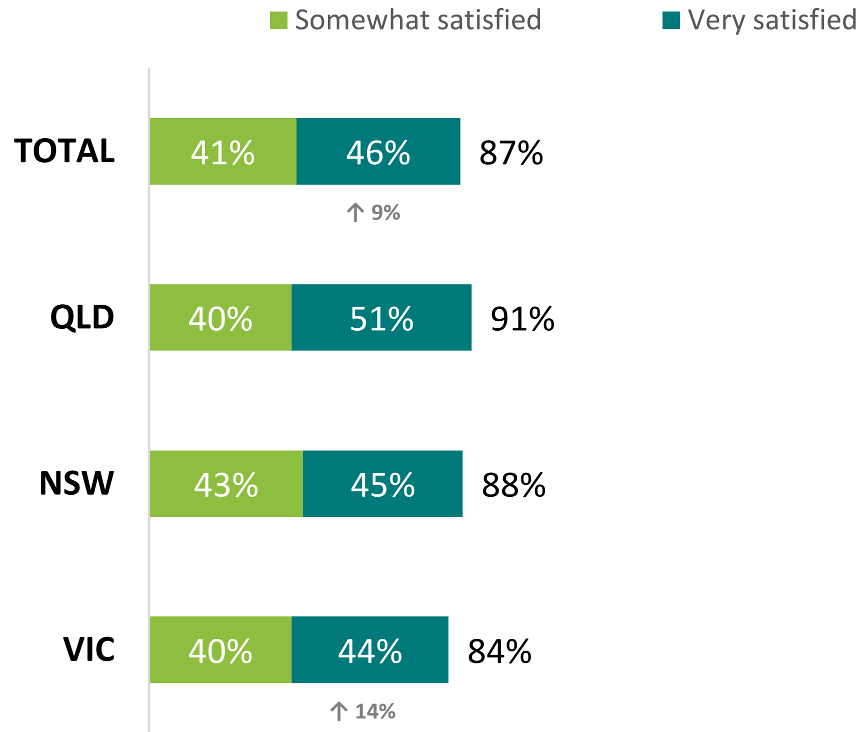
Quality of mangoes

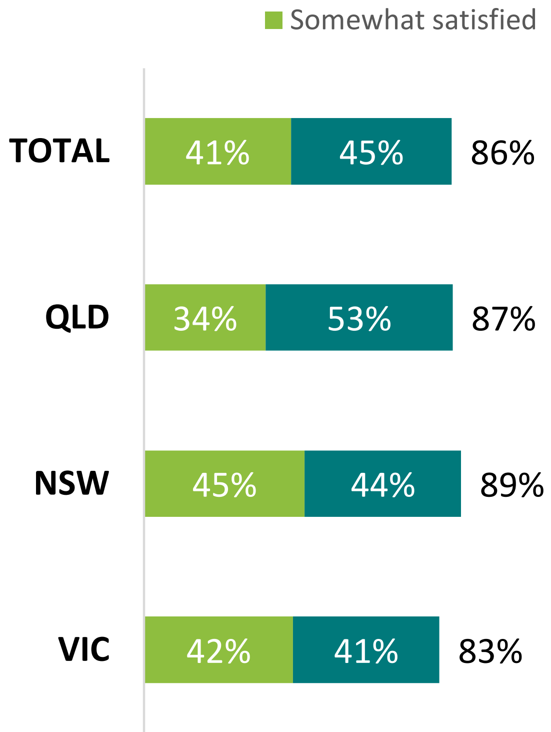
COLOUR of the FLESH



- **Queenslanders are more likely to be satisfied** with the colours of the flesh this season compared to other states – with 9 in 10 satisfied with the colours of the flesh.
- Victoria has seen a significant increase in those very satisfied with the colours of the flesh

Quality of mangoes

LEVEL of JUICINESS



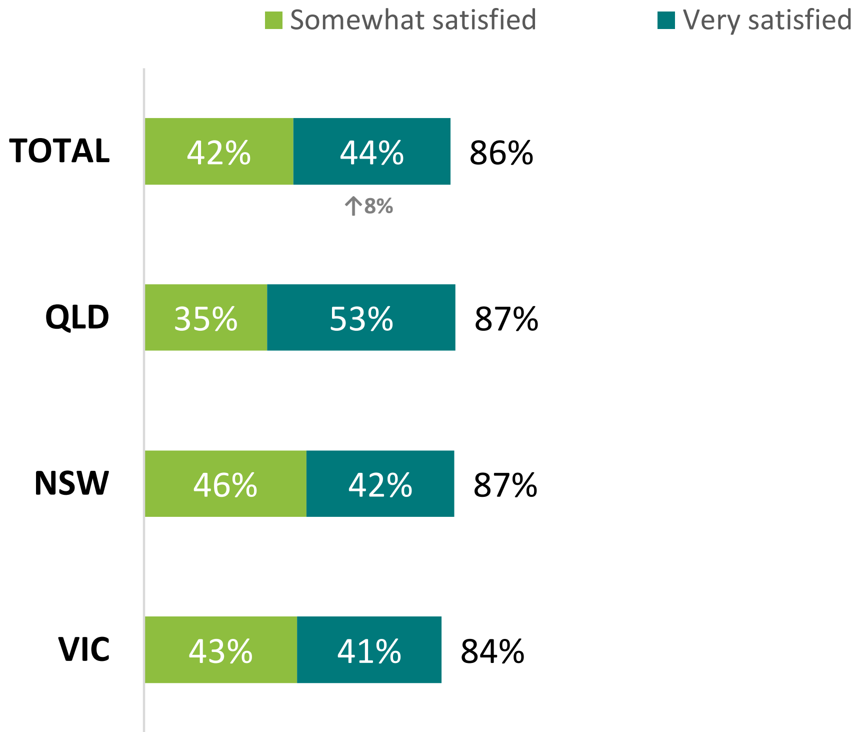
- **Queenslanders are more likely to be 'very satisfied'** with the level of juiciness in the mangoes this season compared to other states – with nearly 1 in 2 claiming to be 'very satisfied' with the level of juiciness.
- However, Queenslanders' overall satisfaction remains on par with other states.

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

Quality of mangoes

LEVEL of SWEETNESS



- Queenslanders more likely to be very satisfied with the level of sweetness of the mangoes this season compared to other states – with almost 9 in 10 claiming to satisfied to some degree.
- However, Queenslanders' overall satisfaction remains on par with other states.

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

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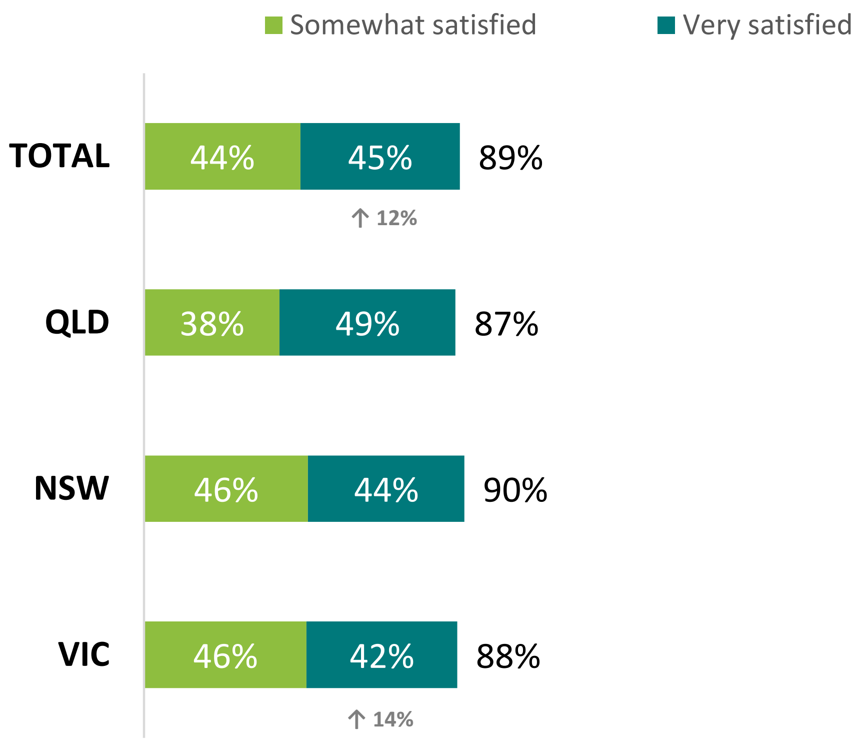
Quality of mangoes

COLOUR of the mangoes



- Those living in **NSW are slightly more likely to be satisfied** with the colour of the mangoes this season than the other states - with 9 in 10 satisfied to some degree.

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

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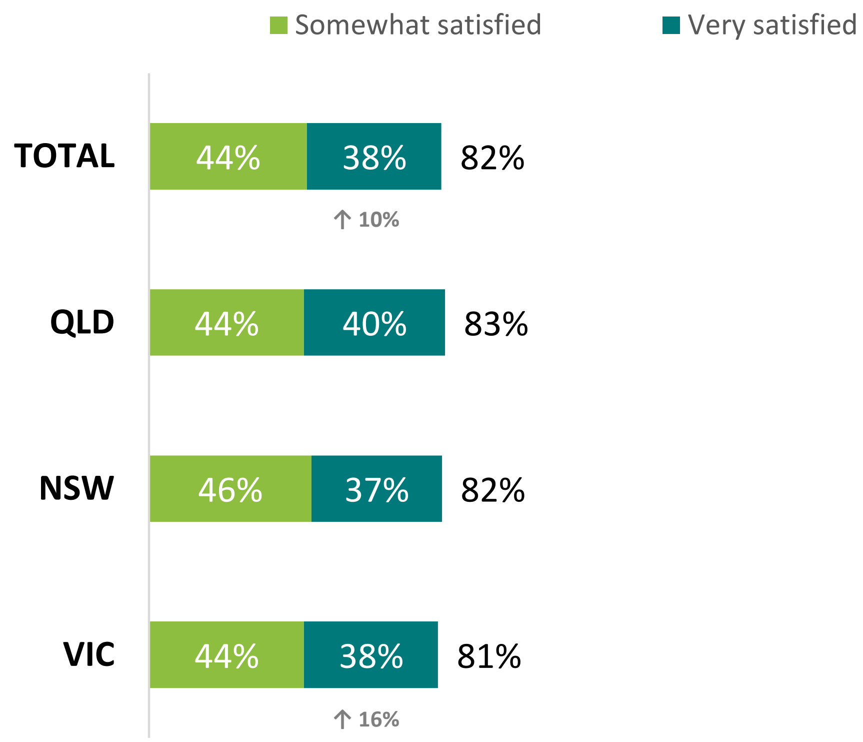
Quality of mangoes

FEEL of the mangoes



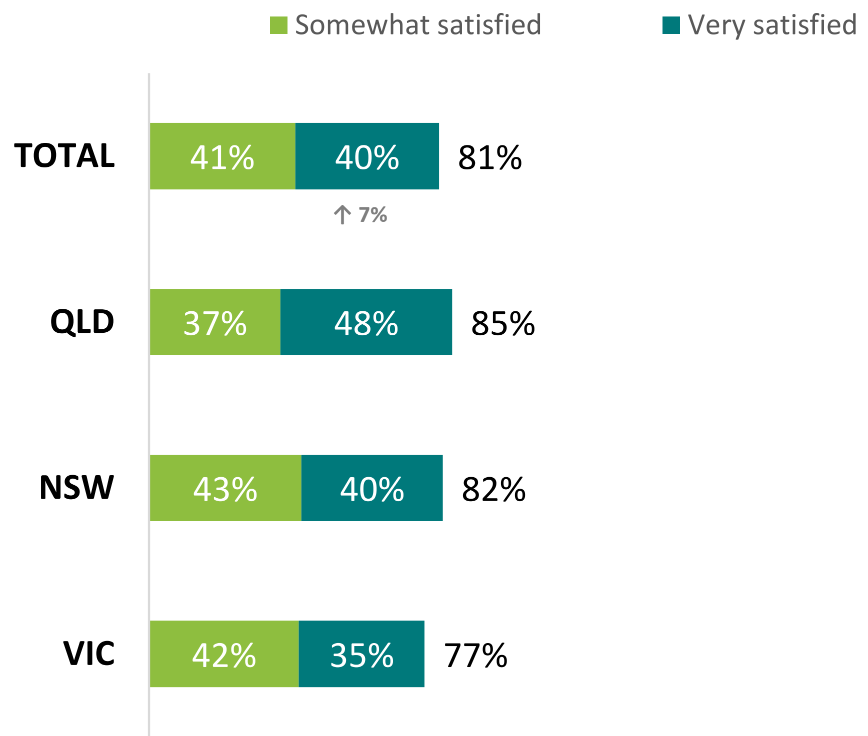
- Satisfaction across states in relatively on par.
- At a total level, there is **greater satisfaction with the feel of the mangoes** – those very satisfied has significantly increased from 2017. This appears to be driven by those living in Victoria.

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

Quality of mangoes

AROMA of the mangoes



- Satisfaction with the aroma of mangoes this season is **lower in Victoria** compared to other states but remains **consistent with 2017**.

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

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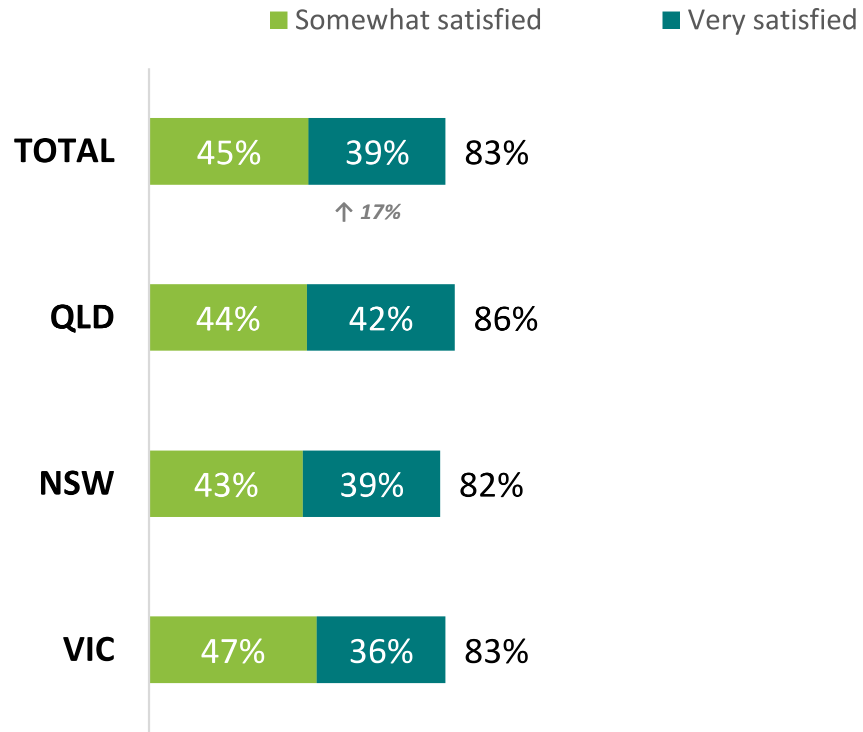
Quality of mangoes

SKIN of the mangoes



- Queenslanders are slightly more likely to be satisfied with the skin of the mangoes this season compared to other states.

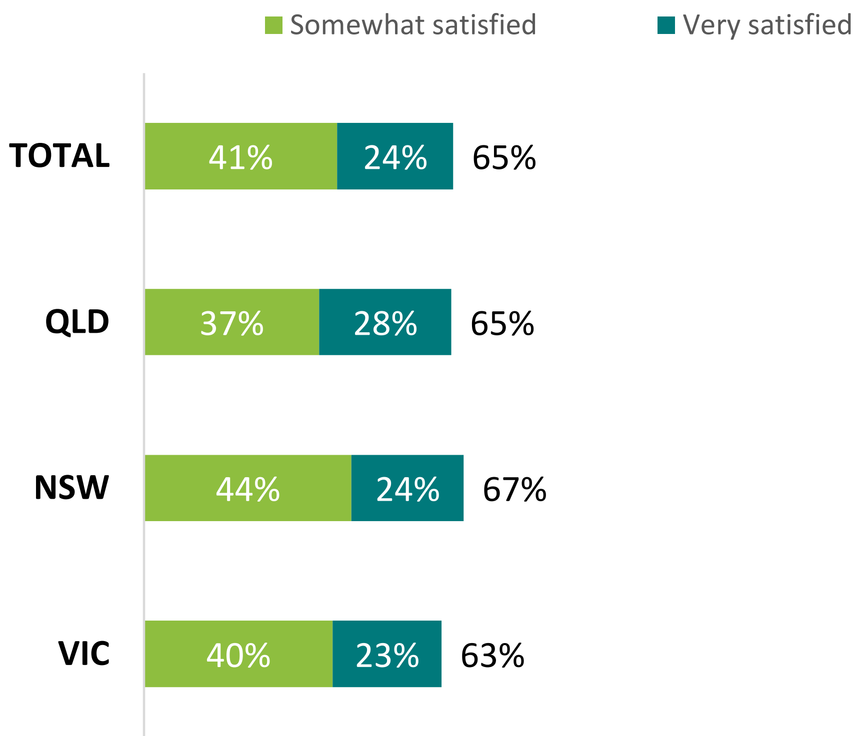
**New to the study in 2017

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

Quality of mangoes

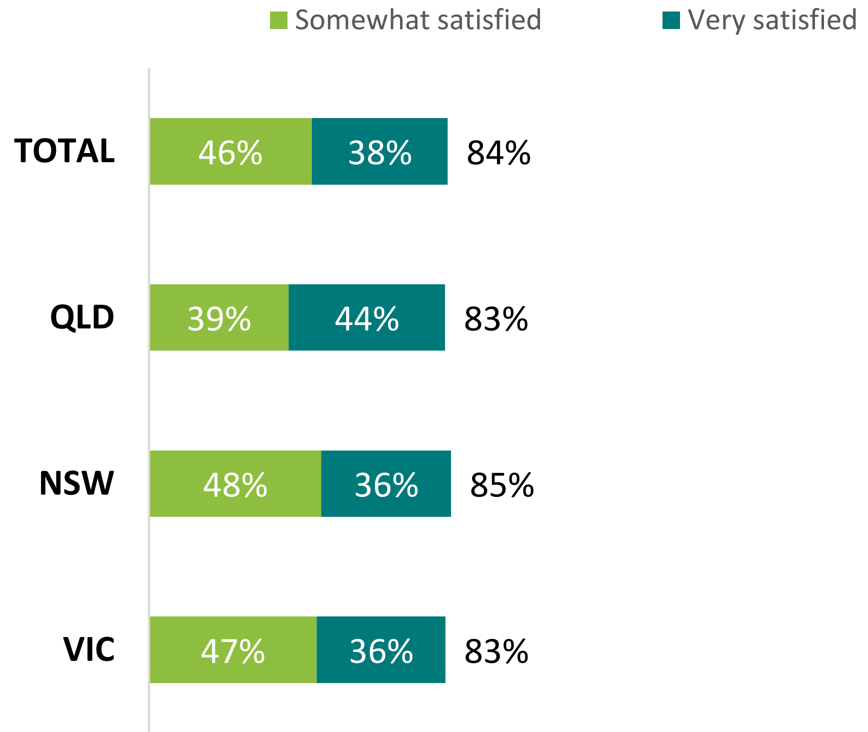
RANGE of the mangoes



- No significant differences in satisfaction across the regions - VIC is slightly less likely to be 'very satisfied' compared to the other states.
- NSW is the most satisfied on any level at the range of mangoes on offer this summer

Quality of mangoes

RIPENESS of the mangoes



- All regions are equally satisfied with the ripeness of the mangoes this season.
- Queenslanders are more likely to be very satisfied than those in other states.

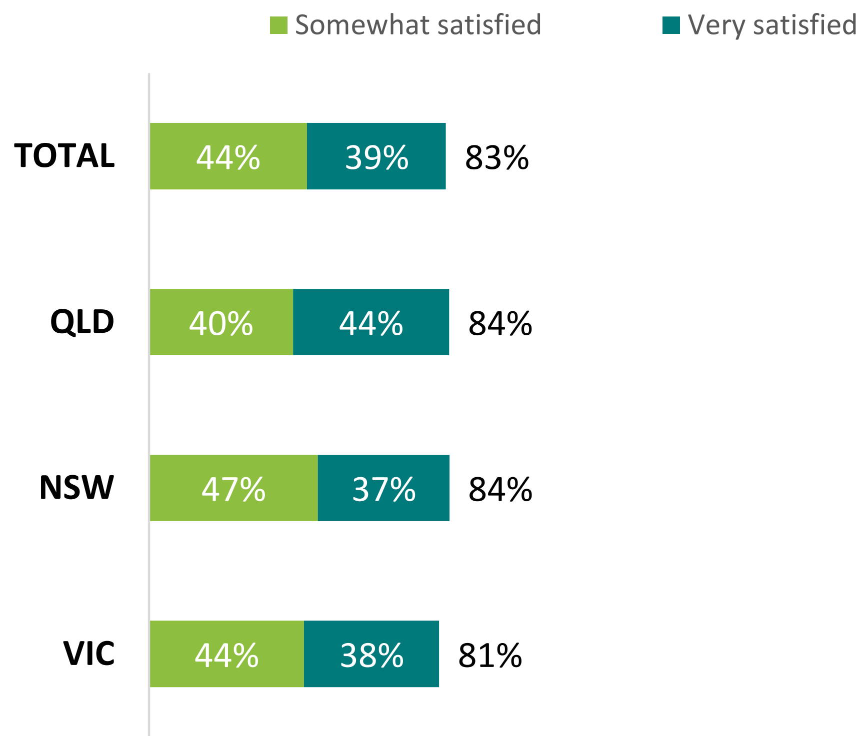
**New to the study in 2020

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

Quality of mangoes

SIZE of the mangoes



- Victorians are slightly less satisfied with the size of the mangoes.
- Queenslanders are more likely to be very satisfied than those in other states.

**New to the study in 2020

Base Total n= 1199; QLD n=299; NSW n=498; VIC n=402
Q4ii. Please read the following statements about MANGOES and rate how satisfied or dissatisfied you were with the QUALITY of mangoes this season.

↑ ↓ = Sig Testing 95% CI against previous read

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Quality by State

Key insights

Satisfaction levels of all quality metrics is relatively inline with what was seen in 2017, with the exception of skin and colour of the mangoes which are both significantly higher than what was seen in the previous read.

Victoria consistently has been more likely to have lower satisfaction proportions across the quality metrics, however, has seen significant increases from 2017.

Range is ranked last on the list of quality attributes in terms of satisfaction.

Usage Occasions

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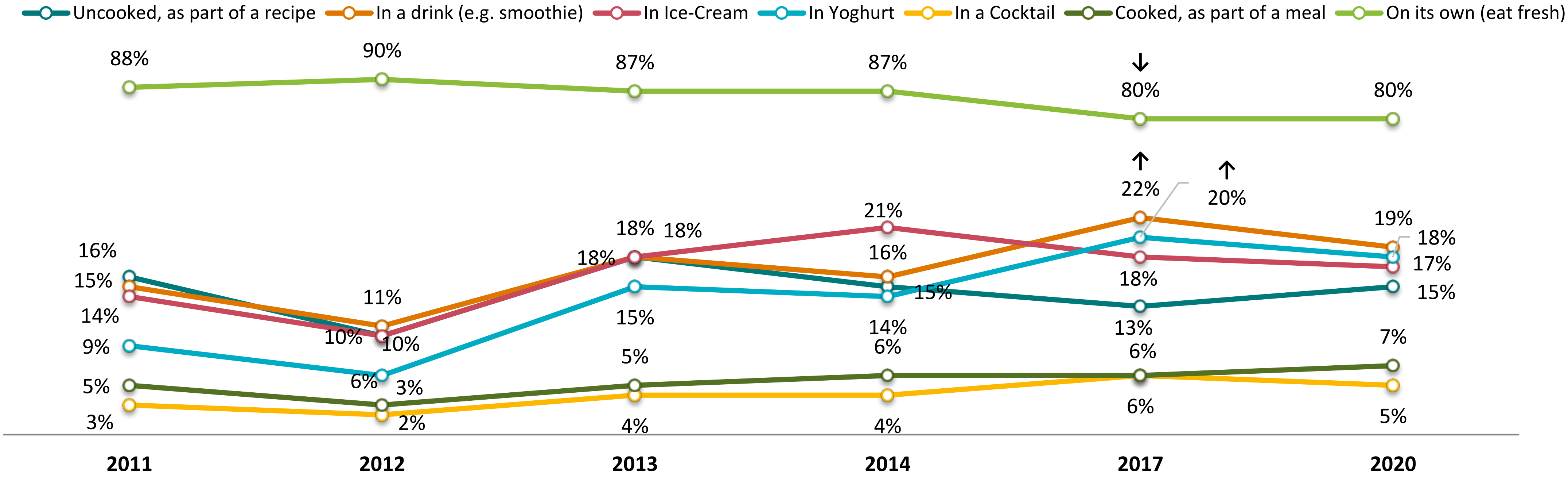
Most recent eating occasion

4 in 5 say they last purchased mangoes to eat fresh on their own – this has remained consistent with 2017 following the significant drop from 2014.

Use in a drink or in yoghurt has decreased slightly following a significant increase in 2017.

Planned to have mangoes…



↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2011 n=850; 2012 n=846; 2013 n=859; 2014 n=793; 2017 n=910; 2020 n=1199
U1 What were you planning to use the mangoes for on this most recent occasion? (MULTIPLE RESPONSE)

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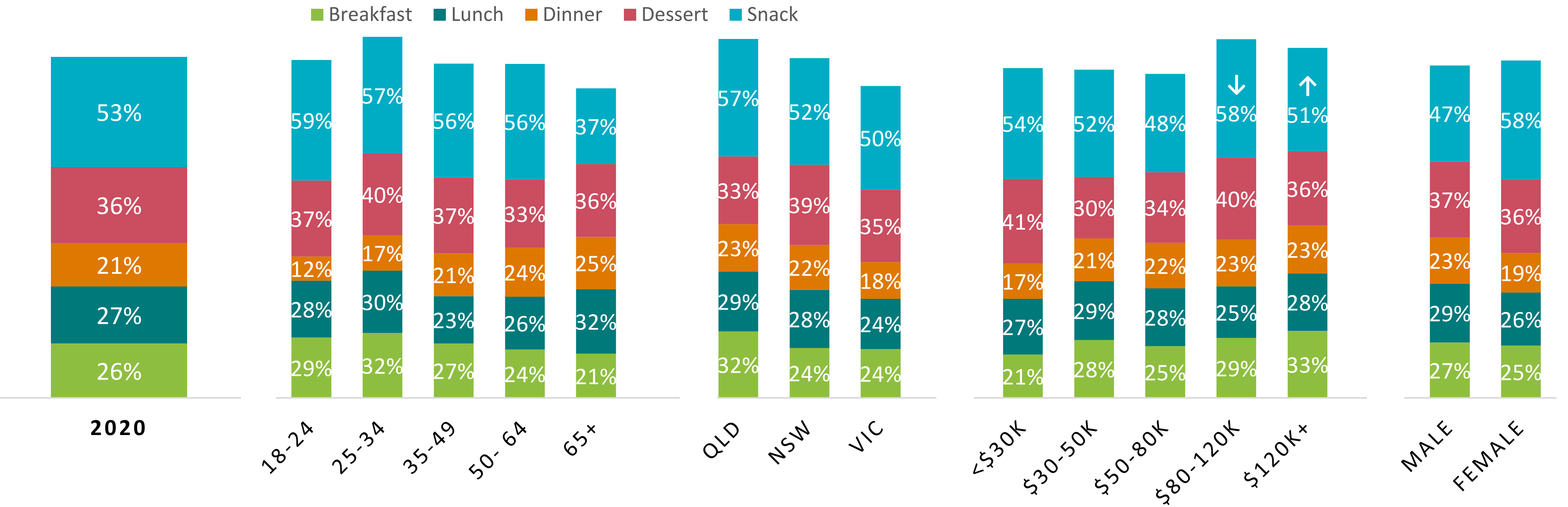
Most recent eating occasion – Time of day

1 in 2 say they planned to eat their mangoes as a snack, followed by dessert. Breakfast, lunch and dinner are equal contenders. Females are significantly more likely to eat mangoes as a snack. Queenslanders plan to consume mangoes at a greater variety of mealtimes.

What time of day were you planning to eat mangoes?

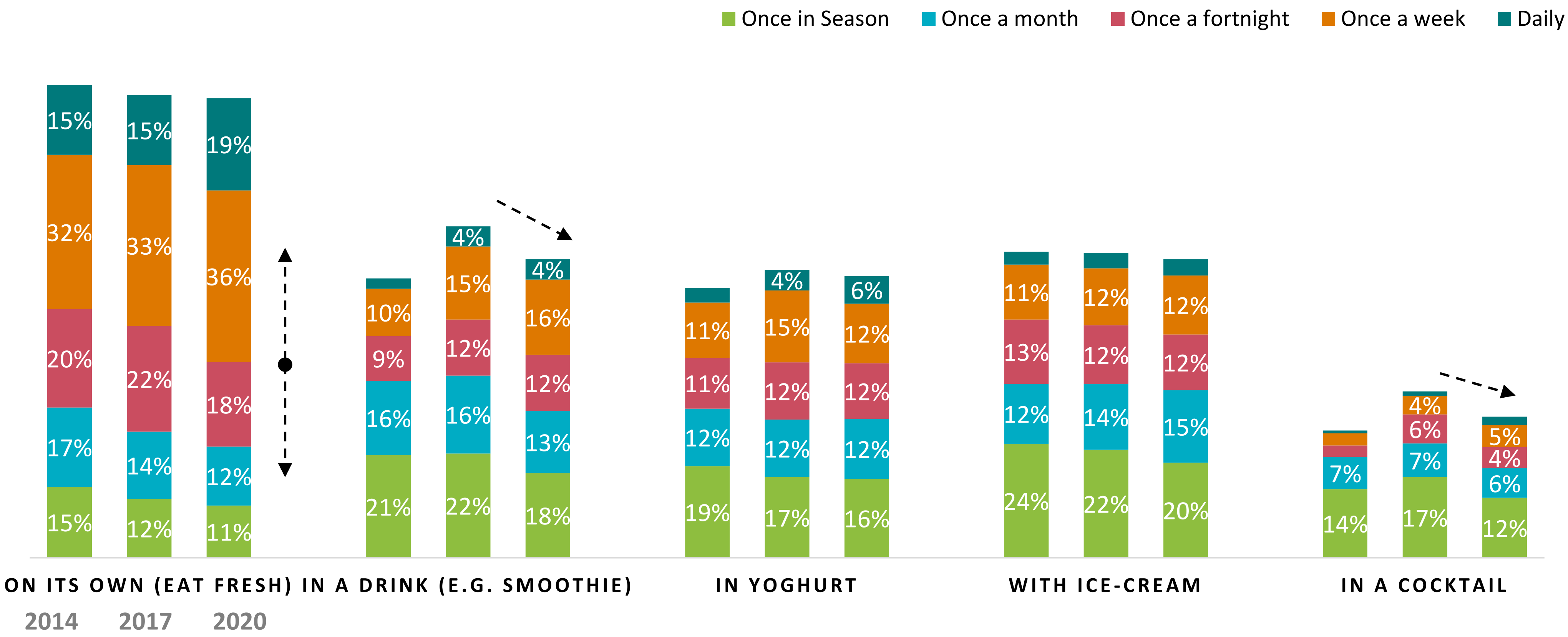


↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2011 n=850; 2012 n=846; 2013 n=859; 2014 n=793; 2017 n=910; 2020 n=1199
U1 What were you planning to use the mangoes for on this most recent occasion? (MULTIPLE RESPONSE)

Mango Season (1 of 2)

Consumption frequency of fresh mangoes on their own has increased since 2017, with weekly and daily consumption gaining share from less frequent consumption brackets. Overall use in a drink or cocktail has decreased from 2017.

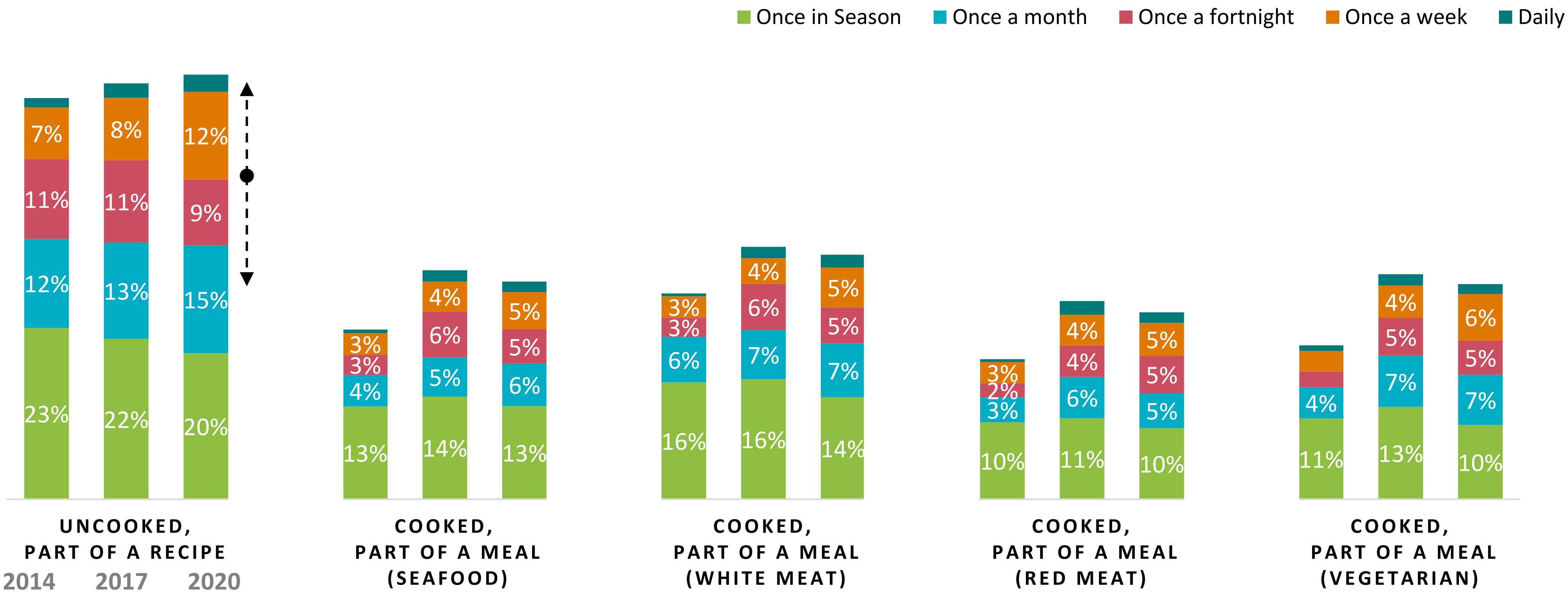


↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n=793; 2017 n=910; 2020 n=1199
U2 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

Mango Season (2 of 2)

Consumption frequency of uncooked mangoes in recipes has increased slightly, as has its overall use. Fewer consumers are cooking mangoes as part of meal than in 2017, but those who do are doing so with the relatively same frequency. This is true regardless of type of meat.



↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n=793; 2017 n=1199

U2 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

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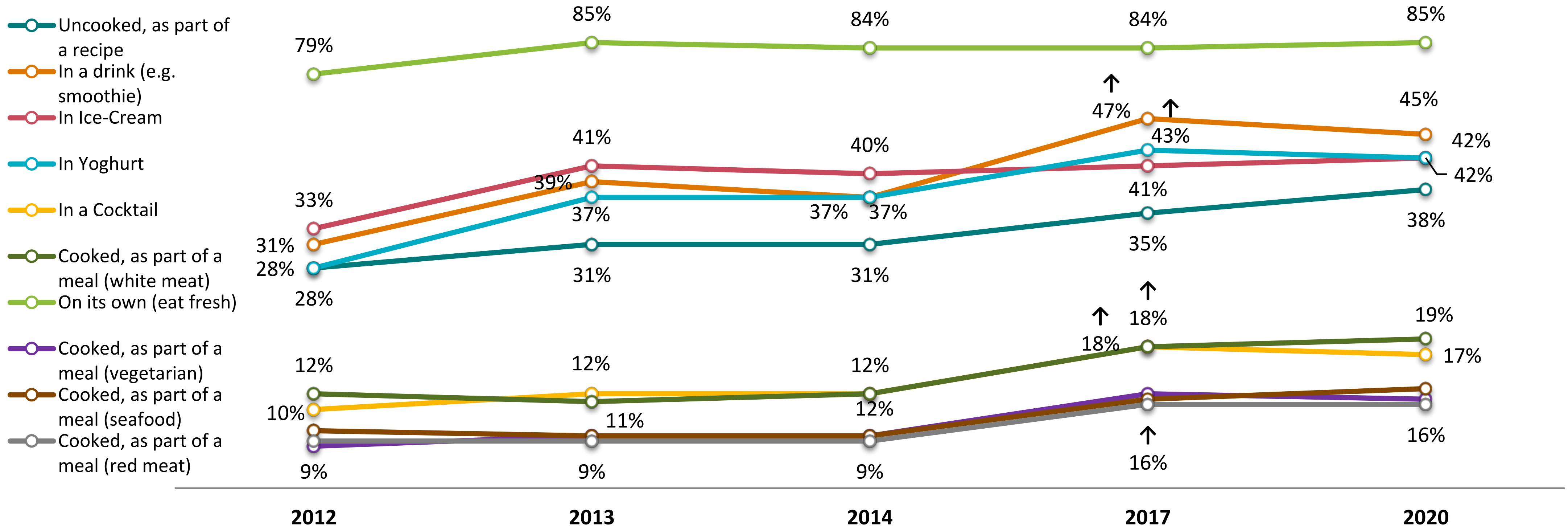
Mango Season – Monthly usage

At least monthly usage of fresh mangoes by themselves has remained steady since 2013.
Usage has remained relatively stable across those that experienced significant increases in 2017.

Use mangoes at least monthly…

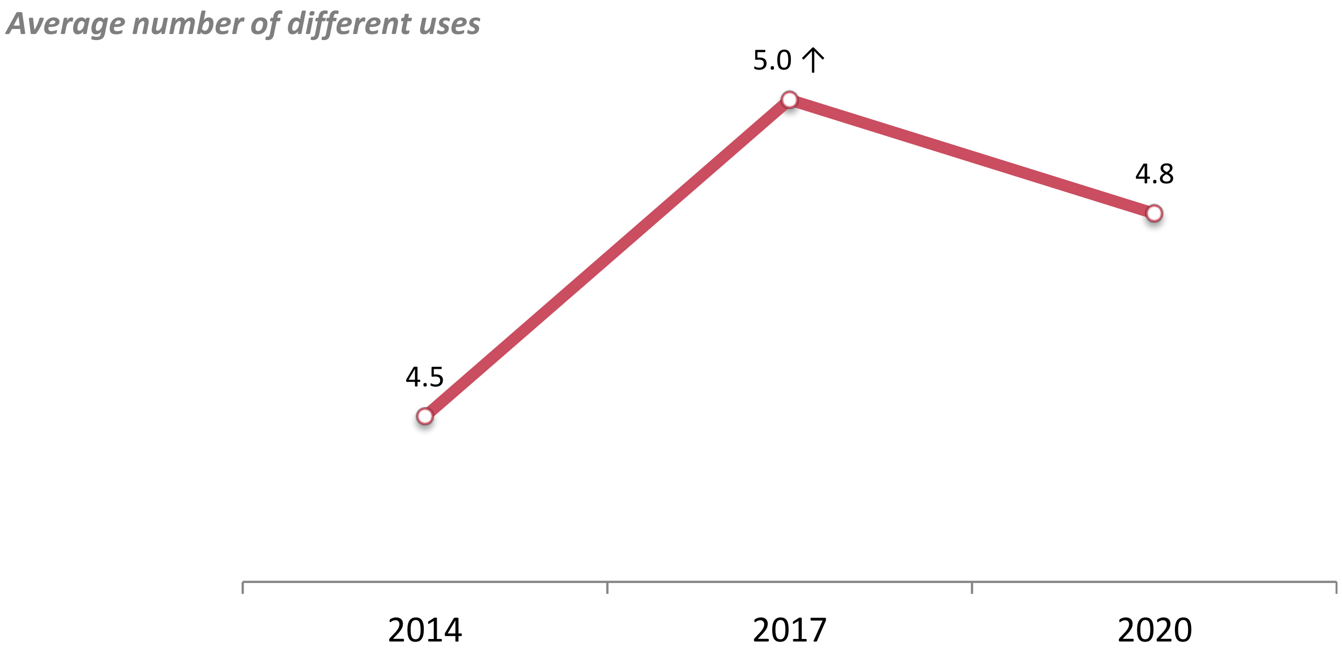


= Sig Testing 95% CI against previous read

Base Total 2014 n=793; 2017 n=910; 2020 n=1199
U3 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

Repertoire of uses

The average number of different consumption uses of mangoes has dropped slightly from the significant increase seen in 2017. This appears to be driven by use in a smoothie, yoghurt, cocktails and cooked as part of a meal (any meat/vegetarian), which follow the same trend in terms of overall use.

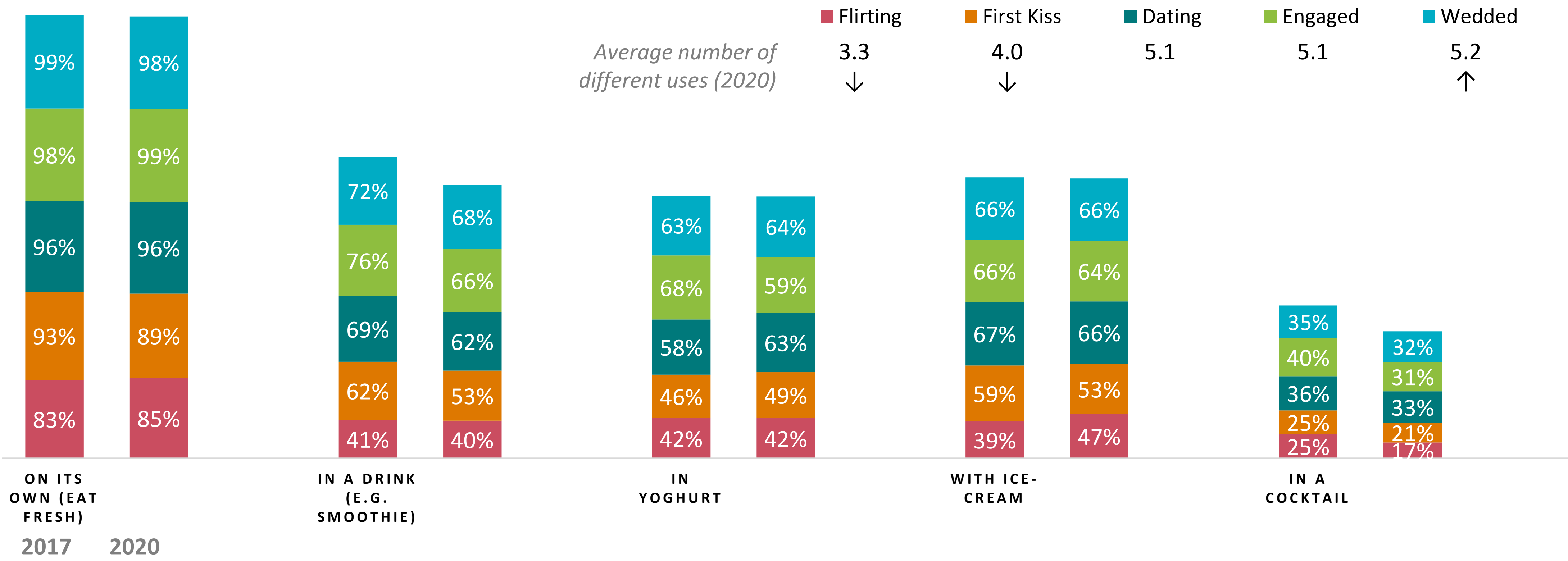


↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n=793; 2017 n=910; 2020 n=1199
U3 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

Those who purchase fewer mangoes have a lower repertoire of uses

On average, Wedded mango buyers have nearly twice as many different uses compared to those who are Flirting. Amongst those Flirting mango buyers, consumption of mangoes with ice-cream has increased from 2017.



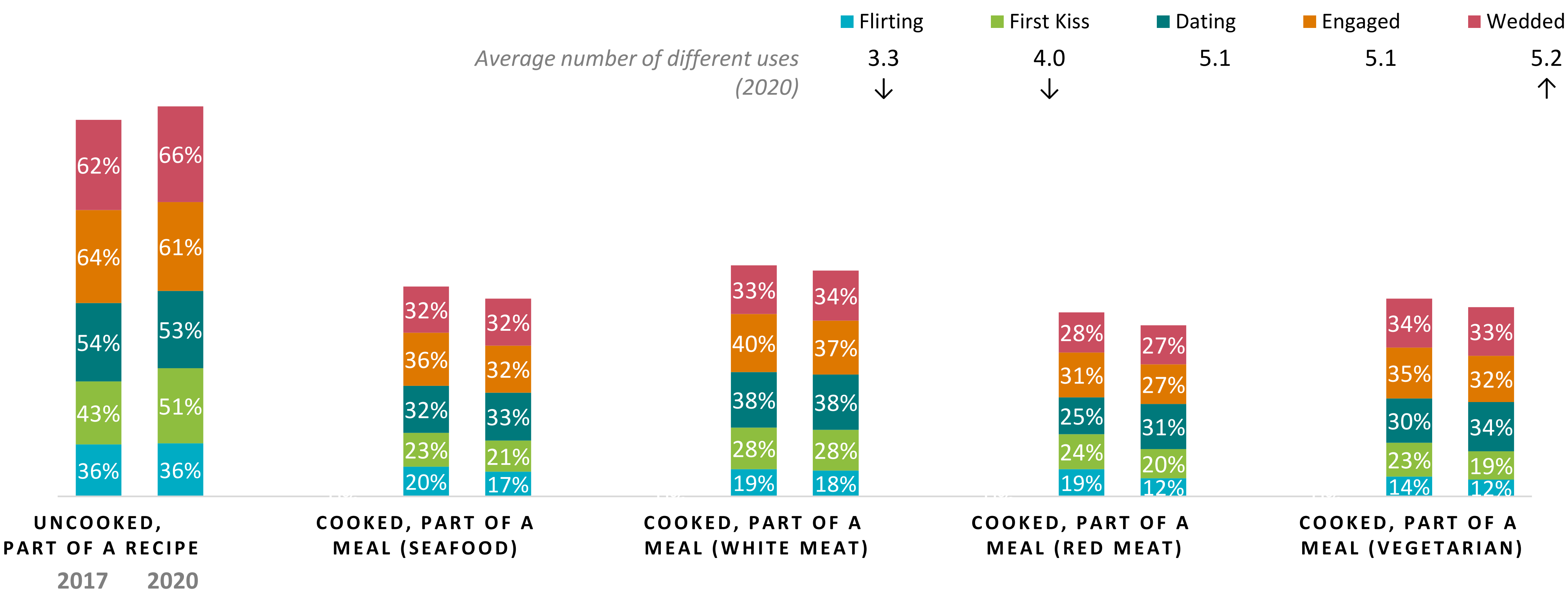
↑ ↓ = Sig Testing 95% CI against total

Base Total 2017 n=910; 2020 n=1199

U3 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

Increase in use of uncooked mango in recipes is driven by Heavy buyers

Decreases in using cooked mango as a part of a meal with red meat appears to be driven by Flirting and First Kiss mango buyers.



↑ ↓ = Sig Testing 95% CI against total

Base Total 2017 n=910; 2020 n=1199
U3 Still thinking about how you use MANGOES, can you please advise how often would you use MANGOES in the following ways?

Usage Occasions

Key insights

Usage occasions have remained stable from 2017, with a slight increase in frequency of consuming mango fresh on their own (not overall incidence though).

Queenslanders consume mangoes at a wider variety of mealtimes, especially breakfast and as a snack. Targeted communications could increase this in NSW and Victoria.

The repertoire of usage occasions has seen a slight drop from 2017. Encourage purchase frequency by giving consumers more reason to use mangoes.

Perceptions of Mangoes

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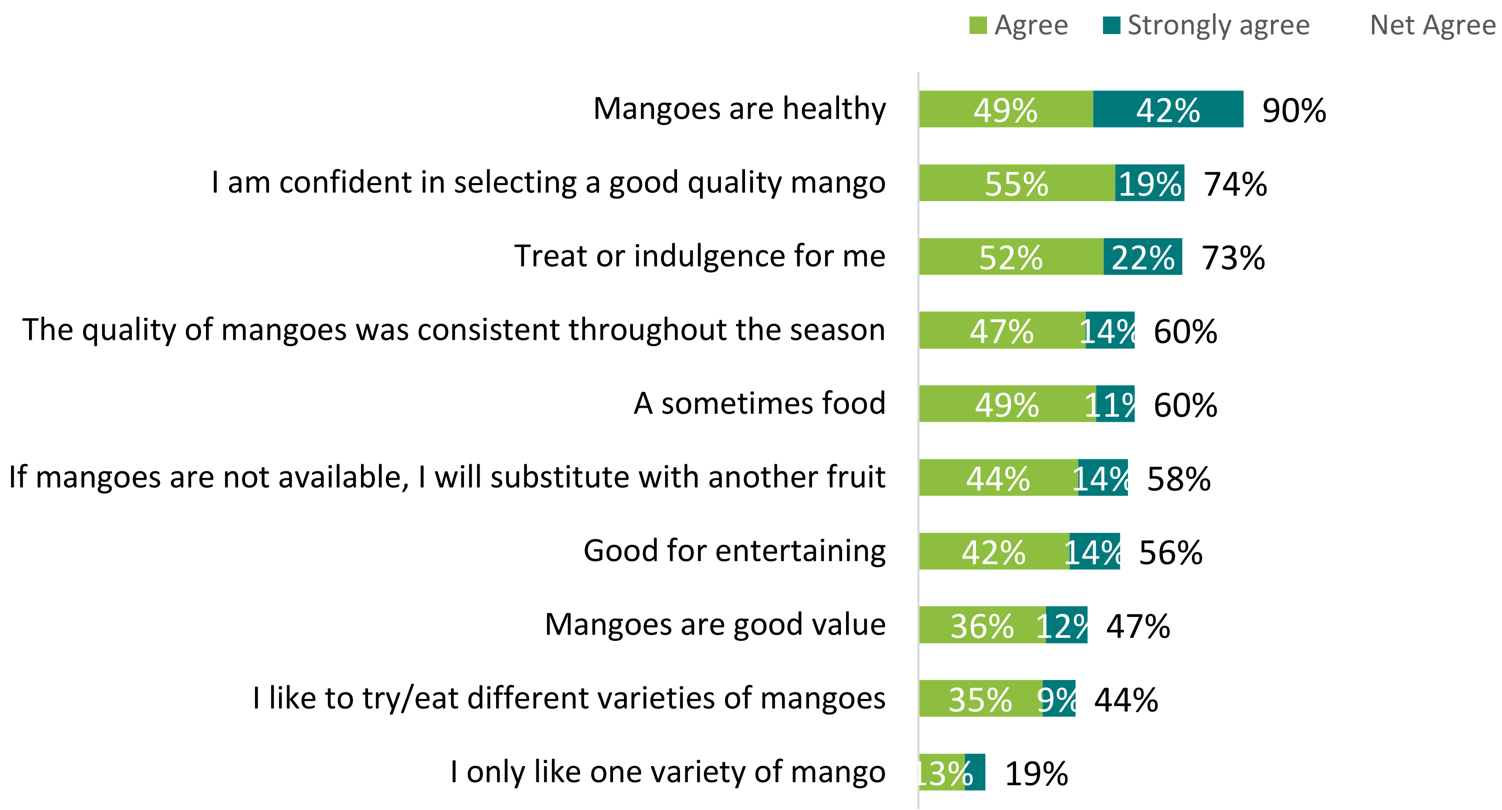
3 in 4 are confident in selecting a good quality mango



- 9 in 10 associate mangoes with health.
- Mangoes are relatively strongly **perceived** as being a **treat and sometimes food**.
- Just under half like to try/eat different varieties of mangoes.

Thankyou

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THE HUMAN STORY

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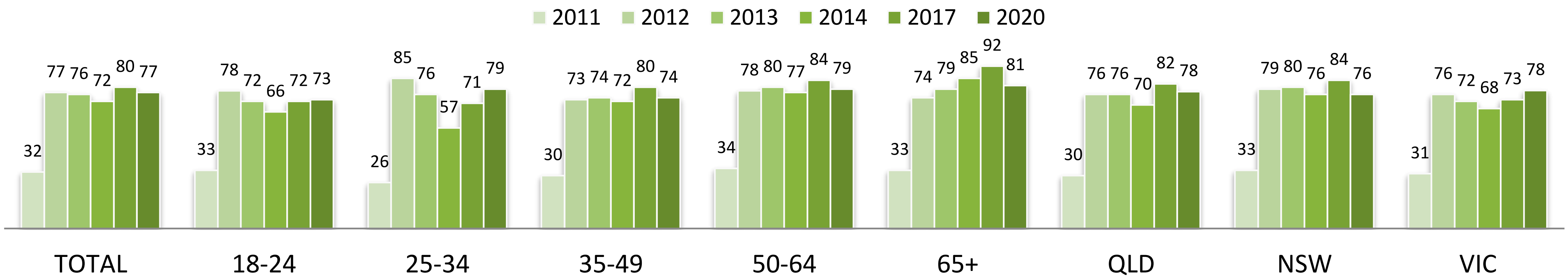
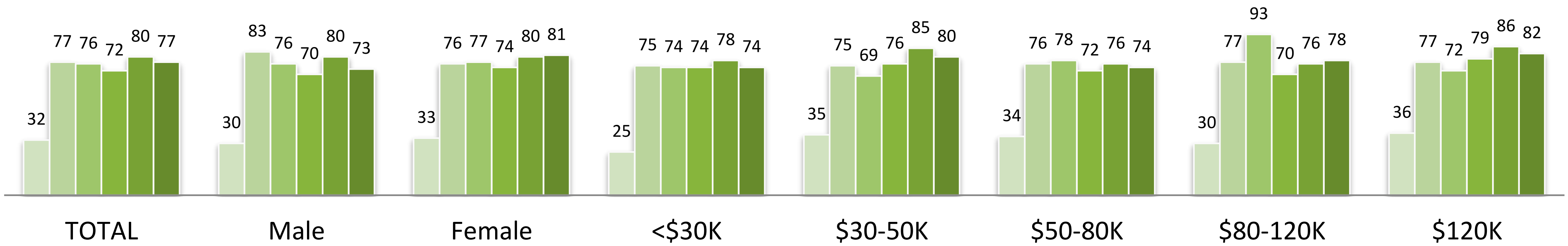
Appendix

Quality of the mangoes has a major influence on Impulse purchase

The influence of quality has remained fairly stable across all cohorts since 2017. Quality continues to be a greater influence for older age groups and lower income brackets.



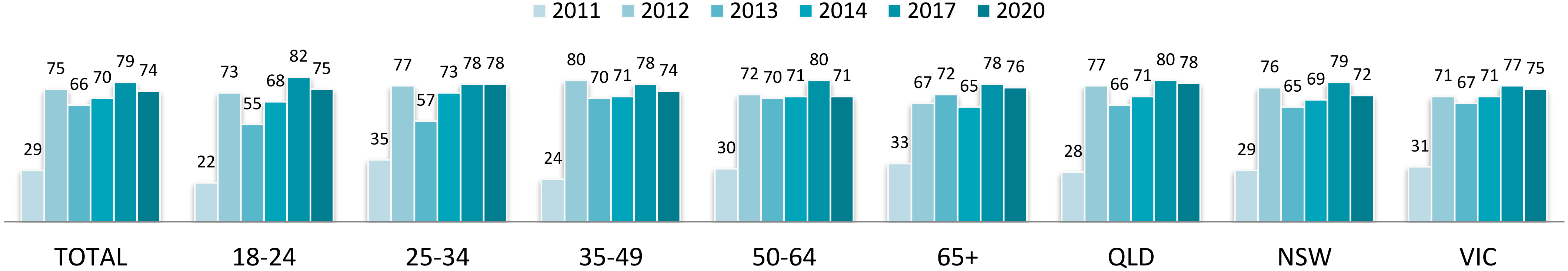


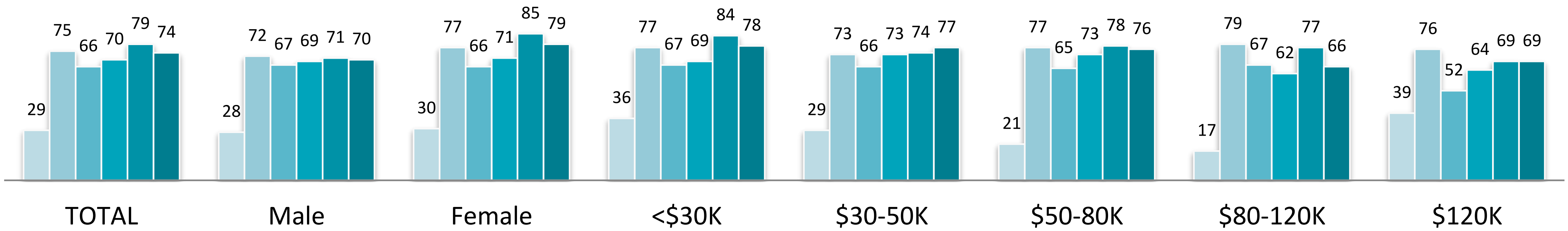
↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n= 528; 2017 n=588; 2020 = Base Total 2014 n= 528; 2017 n=588; 2020 = 980
Q4 You mentioned you did not necessarily plan to buy mangoes which of the following (if any) influenced your decision to buy mangoes on Impulse?

Quality of the mangoes has a major influencer of Impulse purchase

The influence of price has seen a slight decrease compared to 2017 across all age brackets and most income brackets. Regionally, NSW has seen the biggest drop in price being an influencer of impulse purchasing.





↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n= 528; 2017 n=588; 2020 = 980

Q4 You mentioned you did not necessarily plan to buy mangoes which of the following (if any) influenced your decision to buy mangoes on Impulse?

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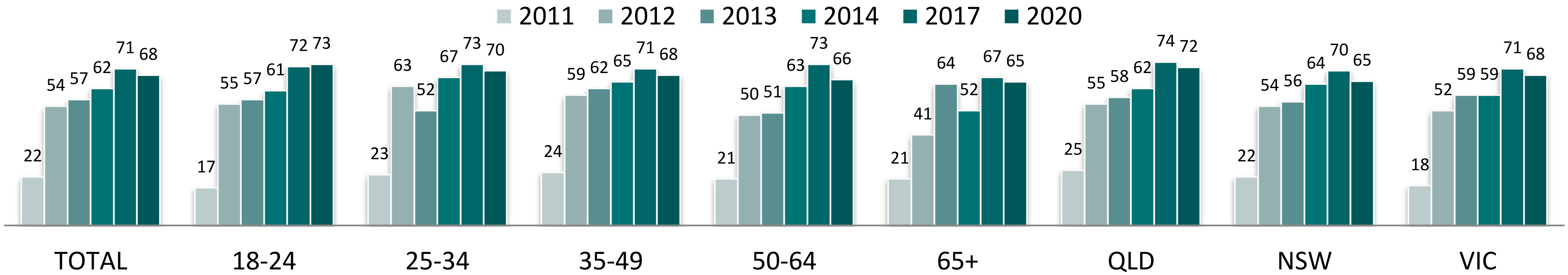
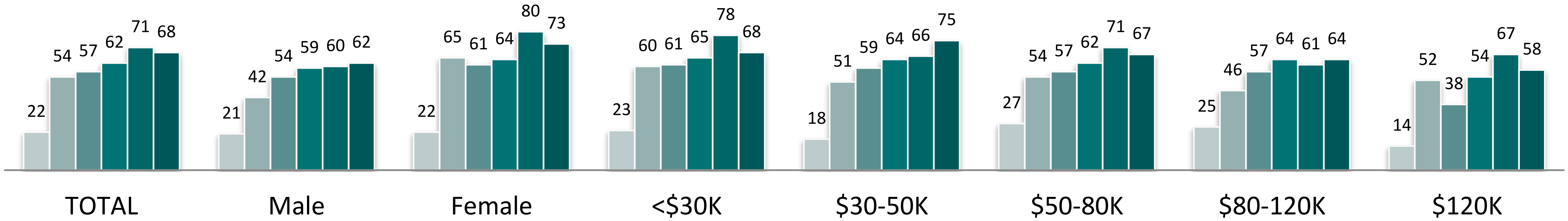
Specials are an influence amongst 68% of Impulse buyers

Mangoes being on special continues to be an important motivator in the purchase decision despite seeing minor drops across all age brackets since 2017. Driven in large by the younger market, Female, $30-$50k income bracket.



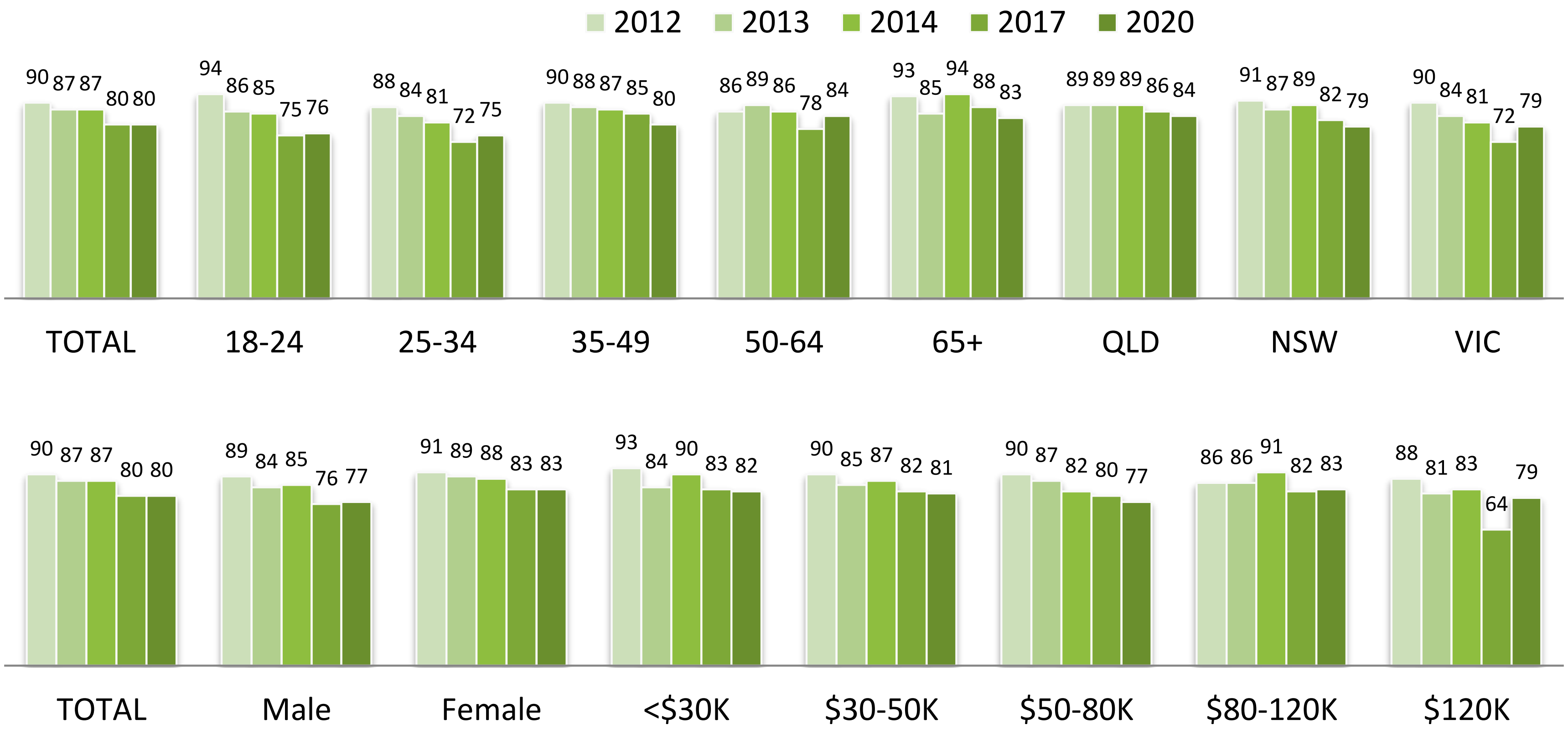


↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2014 n= 528; 2017 n=588; 2020 = 980

Q4 You mentioned you did not necessarily plan to buy mangoes which of the following (if any) influenced your decision to buy mangoes on Impulse?

Consumption of fresh mangoes on their own – by cohort



↑ ↓ = Sig Testing 95% CI against previous read

Base Total 2012 n=846; 2013 n=859; 2014 n=793; 2017 n=910; 2020 n=1199
U1 What were you planning to use the mangoes for on this most recent occasion? (MULTIPLE RESPONSE)

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